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ABSTRACT

Designed to be used with the General Marketing Curriculum Planning Guide (ED 156 860), this guide is intended to provide the curriuclum coordinator with a basis for planning a comprehensive program in the field of marketing for transportation and warehousing. It contains job competency sheets in eight instructional areas: (1) communications, (2) human relations, (3) marketing/economics, (4) management, (5) mathematics, (6) operations, (7) product and/or service technology, and (8) selling. Following sections containing information on careers in transportation and warehousing and a bibliography of resources, competencies are identified and listed according to importance based upon structured interviews with persons employed in the transportation and warehousing industry. A sheet for each competency contains the cluster instructional objective, the job skill, suggested learning activities, and references. (LRA)

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TRANSPORTATION AND WAREHOUSING

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MARKETING
AND
DISTRIBUTIVE EDUCATION
CURRICULUM GUIDE IN
TRANSPORTATION AND
WAREHOUSING

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	Number	Color
Communications	2	Goldenrod
Human Relations	4	Buff
Marketing/Economics	5	Blue
Management	6	Green
Mathematics	7	White
Operations	9	Salmon
Product and/or Service Technology	10	Yellow
Selling	11	Green

FOREWORD

The "Marketing and Distributive Education Curriculum Guide in Transportation and Warehousing" is designed to provide teachers with a basis for planning a comprehensive program in the career field of marketing. A variety of suggested learning activities are provided to enable teachers to determine which activities best serve their teaching needs and their students' learning styles. References are listed so that teachers may obtain teaching materials not available locally by consulting the bibliography for instructional materials in the "Marketing and Distributive Education Curriculum Guide in General Marketing."

The Illinois State Board of Education is committed to assisting local communities in the development of quality instructional programs to prepare and upgrade persons for productive careers in the following 15 instructional program areas of marketing: Advertising; Apparel and Accessories;
Advertising; Apparel and Accessories; Automotive-Petroleum; Marketing Services; Finance and Credit; Food Marketing; Food Service; General Retail Merchandising; Hardware-Building Materials; Farm and Garden; Home Furnishings; Industrial-Materials Handling; Lodging-Recreation and Tourism; Small Business Management; Transportation and Warehousing; and Wholesaling.

This publication should be used in conjunction with "Marketing and Distributive Education Curriculum Planning Guide." Additional publications developed by the Illinois State Board of Education, designed to prepare individuals for careers in marketing include:

1. Marketing and Distributive Education Curriculum Guide in Food Marketing
2. Marketing and Distributive Education Curriculum Guide in General Marketing
3. Marketing and Distributive Education Curriculum Guide in General Retail Marketing
4. Marketing and Distributive Education Curriculum Guide in Wholesaling
5. Marketing and Distributive Education Curriculum Guide in Advertising Services
6. Owning and Operating a Small Business: Strategies for Teaching Small Business Ownership and Management
7. Clothing Apparel and Accessories Merchandising Guide
8. Home Furnishings Merchandising Guide
9. Hospitality Education: A Guide for High School Teachers
10. Marketing and Distributive Education Curriculum Guide in Finance and Credit

The research process used to develop this guide included input from two juries each of 10 transportation and warehousing executives, interviews of 47 persons employed in the transportation and warehousing industry and field testing and critiquing by marketing and distributive education teacher-coordinators in over 100 schools in Illinois. Sincere appreciation is extended to these executives, employees and teachers who contributed to the development of this guide. A special thank you is extended to the 45 teacher-coordinators in the State of Illinois who conducted interviews of transportation and warehousing marketing employees and reviewed the first-draft copies of the guide.

Special recognition goes to Mr. Joseph Young, Richard J. Daley College, consultant representing the Illinois Community College Marketing and Management Association; Mr. Paul Reibman, State of Illinois Secondary Marketing and Distributive Education Association consultant; Mrs. Lucy Crawford, Professor Emeritus, Virginia Polytechnical University, research consultant for the project; Dr. Richard James, University of Wisconsin-Whitewater, research assistant; Mr. Michael Russell, Glenbard East High School research assistants.

A most heartfeld "thank you" is extended to Ms. Kim Vigneux, Ms. Judy Mendoza, Ms. Judy Lessner, Ms. Linda Quattrocchi and other members of the Department of Business Education and Administrative Services staff at Northern Illinois University.

Joseph M. Cronin

Joseph M. Cronin
State Superintendent of Education

RESEARCH PROCEDURES

The development of successful curriculum materials which will be used by vocational teachers requires the cooperation of many individuals. The research procedures used in the development of this guide are briefly described in the following paragraphs.

1. Marketing employment research literature was studied to help determine competencies for verification and further consideration.
2. Literature in the field of distributive and career education used to identify career levels as well as major criterion for promotion in selected marketing occupations with the largest number of individuals employed in the most common first-level position(s).
3. Selected business executive jury members were interviewed to identify and verify the minimum competencies for the most common first-level position(s).
4. Selected business executive jury members were also interviewed to determine:
    a. The various job levels most commonly followed by personnel advancing from selected first-level position(s).
    b. The job requirements of the most common higher-level position(s), and
    c. The major criterion used by management for promoting employees.

The names of the members of the marketing juries and the firms they represent are listed in the Appendix.

5. Task analysis was conducted when needed, to assist in identifying the competencies essential for employment in the most common first-level position(s).
6. Individuals employed in the most common first-level position(s) were interviewed in various communities. These interviews were conducted by marketing and distributive education teachers who volunteered to assist with the research. Interviews were conducted to determine the relative importance of the competencies and to identify additional competencies. A common, structured interview format was used to collect the data. Members of the respective juries suggested the following job description and length of time employed on-the-job of individuals to be interviewed. This information was provided to the teacher-coordinators conducting the structured interviews.

HOW TO USE THE TRANSPORTATION AND WAREHOUSING CURRICULUM GUIDE

The publication, Marketing and Distributive Education Transportation and Warehousing Guide, was prepared during the 1978-1980 period of time. This guide has been designed to provide the curriculum coordinator with a basis for planning a comprehensive program in the field of marketing as well as to provide marketing and distributive education teachers with maximum flexibility in planning a Transportation & Warehousing Curriculum Guide. The essential common and specialized competencies have been identified and listed in order of importance based upon structured interviews with individuals employed in first-, second-, and third-level positions in Transportation and Warehousing. A number of suggested learning activities are listed to enable teachers to determine which ones would best serve their teaching methods and their students' learning styles. Similarly, a number of references have been listed so that the teachers will be aware of the educational materials available in their school and be able to secure them readily by consulting the bibliography of instructional materials printed in the Transportation & Warehousing Curriculum Guide. Cluster Instructional Objectives have been provided to facilitate the organization of instruction for the teacher-coordinator. For maximum usefulness, the competencies have been both number and color coded in the following eleven instructional areas:

Competency	**Number**	**Color**
Advertising	1	Blue
Communications	2	Goldenrod
Display	3	Yellow
Human Relations	4	Buff
Marketing/Economics	5	Blue
Management	6	Green
Mathematics	7	White
Merchandising	8	Pink
Operations	9	Salmon
Product and/or Service Technology	10	Yellow
Selling	11	Green

These instructional areas are the same ones that are used by the Distributive Education Clubs of America for their competency-based competitive events program and for numerous other curriculum projects in the field of marketing and distributive education.

THE GENERAL MARKETING CURRICULUM GUIDE IS THE MASTER PUBLICATION IN THE SERIES AND SHOULD BE STUDIED CAREFULLY BEFORE USING THE OTHER GUIDES. IT IS ALSO IMPORTANT TO NOTE THAT THE GENERAL MARKETING CURRICULUM GUIDE CONTAINS THOSE COMPETENCIES AND LEARNING ACTIVITES WHICH ARE COMMON TO THE FOLLOWING FIVE OCCUPATIONS: FOOD MARKETING, WHOLESALING, GENERAL RETAIL MERCHANDISING, FINANCE AND CREDIT, AND

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TRANSPORTATION AND WAREHOUSING. The use of this guide alone would be inadequate unless the *GENERAL MARKETING CURRICULUM GUIDE* content is also included. The *GENERAL MARKETING CURRICULUM GUIDE* also contains a bibliography of instructional materials that are referenced in this guide and an explanation of the research procedures used in preparing this curriculum guide. The General Marketing Curriculum Guide can be revised to include the competencies which are common to all marketing occupations as future curriculum guides are developed. The loose leaf format is conducive to making these additions without total reprinting.

The Competency Curriculum Planning Grid that is located in the General Marketing Curriculum Guide should be studied carefully during the instructional planning process. This grid has been developed to facilitate the planning of large group, small group, and individual instruction. The planning grid can also be helpful in determining which competencies are most important as perceived by the business executives who were members of the jury and by the employees who were interviewed. The opinions of both of these two business groups should be carefully studied in planning what is to be taught.

Blank sample competency implementation worksheets are included in the General Marketing Curriculum Guide so that as additional competencies are identified on the local level, sheets can be prepared and inserted into the curriculum guides at the appropriate place.

These curriculum guides may be used in a number of different ways depending upon student and community needs, local educational agencies, community learning facilities and resources, teaching style of the teacher, comprehensiveness of the marketing and distributive education curriculum, prior competencies acquired by the students, and other similar factors. Some teacher-coordinators will prefer to help students acquire the competencies listed in the General Marketing Curriculum Guide in lower grade level courses, e.g., introduction to marketing and distributive education, marketing and distribution, retailing, or marketing and distributive education laboratory.

Most teacher-coordinators will also desire to help their students acquire the specific competencies needed for employment in the transportation and warehousing industry in courses taught at the higher grade levels. Area vocational centers, community colleges, and other schools with specialized marketing and distributive education course offerings in the areas of finance and credit, wholesaling, food marketing, and general retail merchandising will find these curriculum materials especially easy to use. Teacher-coordinators in schools without specialized course offerings will find the curriculum materials helpful as they individualize instruction based upon the career objectives of their students.

Instructors for post-secondary and adult students will find the curriculum materials to be especially valuable for preparing individuals to be competent employees for the first-level marketing position(s) that are listed in the foreward. The competency-based approach to curriculum development and individualizing of instruction are viable approaches at all educational levels.

The competencies listed in the General Marketing Guide and the curriculum guides themselves should be considered only as teaching suggestions and not as the complete curriculum. Individual student and community needs as well as the judgment, experience, and opinions of the teachers and advisory committee members should determine the content of the curriculum on the local level. Prior to the instruction in the competencies needed for employment in various marketing career areas, the students in all local schools should have carefully studied and explored the wide array of careers in marketing. Increasingly, schools are providing students with an opportunity to better understand themselves and the world of work through a variety of career education type activities at various lower grade levels.

In the state of Illinois, a course entitled "Orientation to Business, Marketing, and Management Occupations" is recommended at the ninth grade level. A publication entitled Orientation to Business, Marketing, and Management Occupations (1977) has been prepared by the Illinois Office of Education, Department of Adult, Vocational and Technical Education. A curriculum guide for exploring careers in marketing is available from the United States Office of Education. The publication, Career Marketing and Exploration (1976), can be ordered through the superintendent of Documents Office, Public Documents Distribution Center, Pueblo, CO 81009.

The instructional materials listed in the reference column of the curriculum guides and in the bibliography of instructional materials were selected because they are the ones that are most commonly used by teachers in the field. A major effort was made to limit the number of updated references so that the local educational agencies would be able to purchase them if necessary.

The edition number is only listed for those newer publications in which there is an older edition that is currently being used in a large number of schools. In most cases more than one instructional reference is provided. This was done to help insure the local availability of at least one of the references and also to provide flexibility for both the teacher and students in individualizing instruction.

CAREERS IN TRANSPORTATION AND WAREHOUSING

The transportation and warehousing industry continues to grow at an increasing rate. Business and industry in the United States spend more than $420 billion each year in the transportation of goods. This growth has created a demand for people with career aspirations in the field of transportation and warehousing. In 1978, 10 million people were employed in the transportation and related industries and this figure will continue to grow steadily. More than 10% of the United States work force are employed in the transportation industry.

A significant amount of the growth in the transportation and warehousing industry is due to the cost-consciousness of people involved in the field of marketing. The transportation and warehousing industry, which is often referred to as physical distribution, is constantly striving for increased efficiency, which makes the necessity of recruiting and training employees most important.

Transportation and warehousing is an exciting field with many opportunities. A person interested in physical distribution as a career will find opportunities in areas such as railroads, motor carriers, airlines, the waterway industry, and/or the warehousing industry. Career opportunities can also be found in many manufacturing companies which have divisions of transportation and warehousing. Typically, this industry is divided into two areas: (1) the carriers of goods, i.e. the rails, airlines, trucking, etc., and (2) the users or buyers of these services, i.e. companies like Ceco Corporation, National Can Corporation, Sears and Roebuck, JC Penney, and many other companies who produce and ship their own products. These companies must either operate their own transportation and warehousing division or purchase this service. Either way, the company must have well trained employees in this area to handle this aspect of the business. There are three major divisions in the transportation and warehousing industry which include:

1. Customer Service/Traffic
2. Operations/Safety
3. Administration

Additional career information can be acquired in the following sources:

Abell, George H., Molly McKnight, and Jack Stivers, *An Analysis of the Terminal Clerking Occupation*, The Instructional Materials Laboratory, Trade and Industrial Education, the Ohio State University, 1974.

Abell, George H., Molly McKnight, and Jack Stivers, *An Analysis of the Terminal Dispatching Occupation*, The Instructional Materials Laboratory, Trade and Industrial Education, the Ohio State University, 1974.

Beaumont, John A., Kathleen H. Langan, and Louise H. Taylor, Ed.D., *Your Career in Marketing*, New York: Gregg Division, McGraw-Hill Book Co., 1976.

Bikkie, James A. and Eugene L. Dorr, *Careers in Marketing*, New York: Gregg Division, McGraw-Hill Book Co., 1978.

Career Exploration in Marketing and Distribution, Washington, DC: United States Government Printing Office, 1975.

Delta Nu Alpha Transportation Fraternity, *Transportation Career Opportunities*, Orlando, Florida, 1970.

Eggland, Steven A., *Exploring Service Careers*, Cincinnati, Ohio: South-Western Publishing Co., 1979.

"Marketing Careers," *Careers in Focus Filmstrip Series*, New York: Gregg Division, McGraw-Hill Book Company, 1976.

McGill, John P. and W. L. Robinson, *Aim for a Job in the Trucking Industry*, New York: Richards Rosen Press, Inc., 1972.

Tyler, Elias S. and Eugene J. Corenthal, *Materials Handling Traffic and Transportation*, New York: Gregg Division, McGraw-Hill Book Company, 1970.

Walsh, Lawrence A., *Exploring Transportation Occupations*, New York: Gregg Division, McGraw-Hill Book Company, 1976.

JOB DESCRIPTION FOR THE GENERAL TRANSPORTATION CLERK/TRAINEE

The job description for the trainee includes developing both knowledge and experience in one or more of the following activities of the transportation industry:

1) Customer Service/Traffic, which includes the functions of:
   - A. Application of rates and determination of charges. (Pricing)
   - B. Expediting or tracing of shipments.
   - C. Processing of claims—loss and damage or monetary adjustments.
2) Operational Activities, such as:
   - A. Equipment assignment and control.
   - B. Assignment of driving personnel.
   - C. Interface with related terminal activities including equipment maintenance.

A person in the clerk/trainee position can also move into either Customer Service/Traffic or Operations/Safety. Because of the wide variety of types of business in which a person can find a position in transportation and warehousing, it is difficult to precisely identify all of the opportunities or positions available. Job titles and duties assigned to a particular job will vary with the size of the business, the location and type of business i.e. shipper or carrier. Most common and frequently found positions are listed in the following section entitled "Career Ladder for Transportation and Warehousing."

A general transportation clerk/trainee needs to possess several characteristics to advance on the job. It is important for a worker in transportation to possess and demonstrate good human relations skills. Good human relations skills are important because the worker will be communicating with shippers, receivers, and personnel in various other transportation services and maintenance areas. Also, it is important for a trainee to possess good communications skills, both written and oral. In addition, good personal grooming habits and job interviewing techniques will be an asset for advancement.

A great deal of the work in transportation involves moving a product from one location to another. A trainee will assist in determining rates, expediting, or tracing of shipments, which requires knowledge of location and distances. Therefore, it is also essential for the employee to have a basic knowledge of geography, particularly as it relates to the relative location of various cities, states, and counties; and in some cases an intimate knowledge of a city or metropolitan area is needed. A trainee should also have adequate background in mathematics. Mathematics is necessary for many of the tasks performed as trainee and is important for advancement. Basic skills should include proficiency with a small hand computer. Finally, a basic knowledge of the labor unions will aid the student in understanding the role the union plays in industry. Information about unions should be furnished in a positive manner and should highlight some of the achievements inspired by the labor staff.

It is important for a worker in the transportation industry to be informed on the role and functions of the labor unions. Labor unions in transportation are well established and have many members. In some cases a union will represent a specific type of worker, for example, The Brotherhood of Locomotive Engineers. In the trucking industry the largest union is the Teamsters, which is a nationwide union with local affiliations. Other unions include the International Longshoremen's Associations, the Brotherhood of Railway and Steamship Clerks and Transit Workers Union of America. Further information can be obtained from the publications listed in Addendum to *Bibliography for Instructional Material Referenced* in the General Marketing, Food Marketing, Wholesaling, General Retail Merchandising, and Finance and Credit Curriculum Guides.

CAREER OPPORTUNITIES IN TRANSPORTATION AND WAREHOUSING

Assuming continued economic growth and a stable supply of petroleum, employment in the transportation industry and related industries will continue to rise from a current figure of over 10 million people, or roughly 10% of the total labor force in the U.S.

A Marketing and Distributive Education student can enter at the clerk/trainee position and work up to a higher level position without a great deal of formal additional education; however, course work in transportation will help facilitate advancement. Experience and demonstrated excellence in performance is also important to promotion. For individuals desiring to move to a management position, it is suggested that advanced level course work be completed.

There are a variety of ways a person can advance; however, most positions are normally preceded by demonstrating proficiency in the clerk/trainee position. A person beginning as a trainee can expect to train for six months to a year. At this time, the trainee will advance into one of the specialized first-level positions.

Although there are three major divisions in transportation and warehousing, i.e. (1) customer service/traffic, (2) operations/safety, (3) administration, the greatest potential for advancement is through the operations division. This is due to two facts: (1) most of the workers in the operations division either come from the customer service division, or (2) have a baccalaureate degree in transportation. The operations division is highly technical. A person needs a background in rates, tariffs, auditing, tracing, and general traffic procedures to be proficient in the operations division. The operations division of a company is local, regional, and national in most cases, which offers great opportunities for management positions.

The customer service division also offers many opportunities. The customer service division consists mainly of office jobs, such as rate clerk, tracing clerk, and traffic clerk. These positions are very technical and can take several years to learn all the aspects of the position. In most cases, people in this division continue advancing in their speciality in the customer service division. For example, a junior rate clerk will advance to rate clerk, then a rate analyst, then possibly supervisor of rates and routes, and finally manager of that division. The training to proficiency can take up to five years. The customer service division is an in-house operation, and advancement involves further education in transportation and management. Finally the administrative division is a third alternative. The administration division consists of mainly management personnel. A person desiring this should consider gaining experience in one or both of the other divisions and obtaining a degree in transportation management. Therefore, a person entering the field of transportation and warehousing should consider the advancement possibilities in each division.

The starting salaries for the trainees will vary with the size, location of firm, and/or previous experience in the transportation industry. Generally, the salary ranges from $8,000 to $10,000 a year. Advancement can be either horizontal from division to division, or vertical through the levels of a particular division. The salary scale increases rapidly as the person gains experience. In 1976, the average earnings in the transportation industry were $14,826. This can be compared to $12,288 in manufacturing, and $11,361 in finance, insurance and real estate.

In 1976, average salaries in the various transportation industries were:

Railway	$17,180
Trucking and Warehousing (combined average)	$13,872
Water	$15,718
Air	$18,484
Pipeline	$18,000
Transportation Service	$11,928

The salary for management positions ranges from $25,200 to $47,600 with the average at $34,375. When considering management, one must note that 95% of the present management in transportation possess a degree or advanced education in their field and are in their late 30's and early 40's. A chart showing the various career levels and job descriptions in the three divisions are described below.

The key to career advancement in Transportation and Warehousing is experience in the industry, ability to work with people, and additional education. A person interested in pursuing a career higher than third level should consider obtaining a Baccalaureate degree with course work in the following areas: (1) management, (2) marketing, (3) cost accounting, (4) business law, (5) traffic management, (6) economics, and (7) statistics. The most common Baccalaureate degree from managers in the industry is in Business Administration.

JOB DESCRIPTIONS FOR TRANSPORTATION AND WAREHOUSING

LEVEL 1 POSITIONS*

CUSTOMER SERVICE (Traffic Department)

Tracing Clerk

Locates delayed or lost shipments. Contacts shippers for necessary information. Uses teletype to inquire about shipment records. Types tracing records.

Ticket Seller/Agent

Sells tickets for transportation agencies. Plans route and computes ticket cost, using schedules and rate books. Insures that space is available. Answers inquiries regarding schedules and accommodations. Depresses key on ticket-dispensing machine that automatically ejects number of tickets requested by patron, or tears tickets from roll and hands to patron. Accepts money and makes change. Answers questions concerning fares, routes, schedules, and reservations. Keeps daily balance sheet of cash received and tickets sold.

Sales Trainee

Works with the salesperson learning the product and making sales calls. Assists with recordkeeping of sales, calls, prospective customers, and delivery information.

Over/Short and Damage Clerk

Examines shipping reports and other forms for information relating to shipping errors. Inspects damaged freight to determine value. Prepares written reports and letters.

Transportational Booking Clerk

Communicates by phone with shippers for bookings and proper metrificiation. Handles sales and traffic correspondence if necessary.

Documentation and Booking Clerk

Prepares reports of labor and equipment costs incurred in loading and unloading ship cargo. Compiles reports of tonnage and type of cargo handled, labor charges involved in loading and unloading cargo, and charges for equipment used. Computes cost per ton on each type of cargo handled and prepares report of total costs for each ship.

Traffic Clerk

Auditing nontechnical freight bills. Maintenance of various railcar and barge records. Expedites and traces company inbound and outbound products from all locations to final destination via all modes of transportation.

Billing Clerk

types invoices, bills of lading and shipping labels. Figures amounts due on purchase orders, sales tickets and charge slips.

OPERATIONS/SAFETY

Shipping and Receiving Clerk

Verifies and keeps records on incoming and outgoing shipments and prepares items for shipment. Compares identifying information and counts, weighs, or measures items of incoming and outgoing shipment to verify against bills of lading,

*Depending on size of the firm and number of employees. Some of these positions may be combined into one.

invoices, orders, or other records. Determines method of shipment, utilizing knowledge of shipping procedures, routes and rates. Routes items to departments.

Flight Attendant

Performs a variety of personal services conducive to safety and comfort of airline passengers, and assigns seats. Explains use of safety equipment, such as seat belts, oxygen masks, and life jackets. Serves previously prepared meals and beverages. Observes passengers to detect signs of discomfort. Answers questions and performs other personal services. Prepares reports showing place of departure and destination, passenger ticket numbers, meal and beverage inventories, lost and found articles and palliatives issued.

Supercargo Freight Clerk

Plans and coordinates loading and unloading of ship's cargo and prepares reports on type, amount and condition of cargo to protect company from claims for damage or shortage. Examines cargo lists to determine types of cargo that can be loaded together. Prepares reports such as tonnage carried, breakage, overages and shortages. Acts as agent of shipowners in foreign ports.

Baggage and Mail Agent

Supervises and coordinates activities or workers engaged in loading and unloading mail and baggage. Coordinates work schedules, assigns duties to workers. Ensures workers are courteous and helpful to passengers, recommends new methods of transferring mail and baggage. Reviews overflow and production charts to determine need for additional workers.

Receiving Checker

Receives, unpacks, and examines goods. Checks shipment against bill of lading or invoice. Keeps record of goods received, short, over and damaged.

Load Coordinator

Transportation, analyze, control and establish loading techniques, packing specifications and marking requirements for all materials, supplies and products shipped from and to all shipping and receiving locations. Makes recommendations in packing standards, monitor quality, type and durability of packaging materials, material handling, equipment and load devices.

Route Clerk

Assists in determining routes. Keeps all necessary records, maintaining necessary tariff files and records.

Log Clerk

Checks driver logs to avoid hours violations of Bureau of Motor Carrier Safety Regulations, and to provide dispatchers with information on driver availability for next assignment. Maintains files and reports related, etc.

Permit and Licensing Clerk

Handles and maintains records, files necessary to acquire permits, and licenses required by federal, state and municipal regulator agencies. Keeps all changes in federal, state and municipal law.

LEVEL 2 POSITIONS

CUSTOMER SERVICE (Traffic Department)

Reservation Agent

Makes and confirms reservations for passengers on scheduled airline flights. Arranges reservations and routing for passengers at request of ticket agent or customer using timetable, airline manual, reference guides, and tariff books. Types requested flight number on keyboard of on-line computer reservation system and scans screen to determine space availability. Telephones customers or ticket agent to advise of changes in flight plan or to cancel or confirm reservations.

Passenger Representative

Relieves conductor in the passenger car as directed, accompanies conductor in the passenger car through the train. Verifies tickets and seat reservations and records information. Answers passengers' questions and suggests activities and accommodations available at destination.

Rate Analyst

Verifies and approves freight bills and statements, the quotations or rates and routes and maintenance of rates and routes.

Traffic Agent

Solicits freight business from industrial and commercial firms and passenger-travel business from travel agencies, schools, clubs, and other organizations. Calls on prospective shippers to explain advantages of using company facilities. Quotes tariffs, rates, and schedules. Explains available routes, load limits, and special equipment available, and offers suggestions in methods of loading, crating, and handling freight. Calls on travel agents, schools, clubs, and other organizations to explain available accommodations offered by the company. Acts as liaison between shipper and carrier to obtain information for settling complaints.

Salesperson

Knows his/her product, and explains benefits to customer, and tells advantages of his/her firm over others, checks on what freight is being shipped, calls on traffic managers to investigate services being offered, studies yellow pages for type of products shipped, traces new business for shipping needs, solicits sales to balance shipments going out and coming back, analyzes delivery records to determine efficiency at terminal, analyzes pickup sheets to determine number of pickups per driver/day, keeps expense sheets and records sales calls and leads.

Containerization Clerk

Traces, orders and requests containers for bookings. Gives rates, types reports and tariff sheets.

Intermodal Yard Supervisor

Coordinates activities within yard with dispatch and receiving clerks to assume proper unloading and loading of TOFC/COFC trains. (Trailer on a flatcar, container on a flatcar)

OPERATIONS

Dispatcher

Scheduling the delivery and pick up of all freight. Route shipments, maintain records of all incoming and outgoing material and equipment. Authorizes, regulates and controls commercial airline flights or railroads according to government and company regulations to expedite and insure safety. Analyzes and evaluates meteorological information. Computes amount of fuel needed, distance of trip, weather conditions, and fuel regulations prescribed by the FAA.

Dock Foreman

Supervises the proper loading of outbound trailers, prepares outbound manifests; destinations, bills, weights; coordinates with drivers to insure on-time service, supervises freight handling, inspects damaged freight, supervises the unloading of inbound freight and the reloading upon city equipment for city delivery, coordination of equipment at dock side to reduce wasted motion and unnecessary labor.

Shop Foreman

Supervises the use of equipment, i.e. fork lifts, line haul trailers, repair and maintenance, handles equipment transfers and inspections, and completes necessary licensing.

Schedule Analyst

Prepares the traffic distribution weekly, monthly, and year-to-date activity and backhaul reports and monitors performance against budget; prepares monthly control reports, monitors terminal dispatch trip reports and other activity and operating reports; reviews, reconciles, and files fuel and mileage reports; sorts and files edited trip reports; and validates mileage and fuel usage reports.

Shipping and Receiving Foreman

Supervises and coordinates activities of workers engaged in verifying and keeping items for shipments. Studies shipping notices, bills of lading, invoices, orders, and other records to determine shipping priorities, work assignments, and shipping methods required to meet shipping and receiving schedules, utilizing knowledge of shipping procedures, routes, and rates. Determines routing and legal load limits of states. Directs movement of shipments from shipping and receiving platform to storage and work areas. Compiles records of unfilled orders.

Inventory Control Clerk

Compiles records of amount, kind, and value of merchandise, material, or stock on hand in establishment or department of establishment. Counts stock, material or merchandise on hand and posts totals to inventory records. Verifies clerical computations against physical count of stock and adjusts errors in computation or count or investigates and reports reasons for discrepancies. Prepares reports of inventory balance, price, and shortages.

Traffic Coordinator/Route Clerk

Assigns duties and subordinates calculating work flow; supervises rate and route quotation activities; examines possible effect on any proposed changes or rates and routes; assists and works with Marketing, Manufacturing and other departments.

Yard Master

Coordinates switchmen, clerks and yard crews. Answers phones and works intercom. Deals with wide range of people. Directs where cars (train) are to be placed.

LEVEL 3 POSITIONS

CUSTOMER SERVICE (Traffic Department)

Tariff Inspector

Schedules periodic visits to passenger and freight-agent offices and ticket offices and examines their files to ascertain that current tariffs are in use; verifies samples of freight bills to ascertain that applicable tariffs have been used; informs and instructs agents on errors.

Rate and Service Manager

Supervises and coordinates carriers with shipping; verifies tariffs and that the company is receiving the lowest costs; handles customer relations and handles correspondence in regard to state, federal and municipal laws.

Assistant Traffic Manager

Assists the traffic manager in conducting studies on company freight and passenger classifications, rates and tariffs and formulates changes required to provide for increased revenues and profitability of operations. Directs and coordinates activities of workers in classification of shipments and in applying and enforcing rates and tariffs.

Account Representative

Handles the accounts of the firms, analyzes accounts to insure prompt payment of all amounts due; prepares past due notes; compiles and maintains worksheets and charts indicating outstanding account receivables.

Customer Service Representative

Answers customers' questions on schedules and fares, ticketing, passengers, checking baggage, boarding passengers and processing minor claims.

Senior Rate Clerk

Verifies and approves freight bills and statements, the quotation of rates to product sales personnel and routes to shipping personnel and the maintenance of rate statements and route schedules.

Assistant Pricing Manager

Assists in all operations of pricing including various tariffs that govern the pricing of transportation service; analyzing and submitting new pricing proposals for the company, as well as analyzing proposals by other carriers.

Office Manager

Supervises the office reports; coordinates the reports of the various divisions, i.e. rates, tariffs, accounting; controls billing procedures; telephone and mail correspondence between both shippers and carriers; works with personnel for hiring procedures.

Market Analyst

Researches the market for the company, keeping abreast of marketing changes and translating those changes into expected impact on the company; presents recommendations to management, both written and oral, based on these studies.

OPERATIONS

Warehouse Supervisor/Dock Foreman

Supervises and coordinates activities or workers engaged in receiving, transporting, stacking, order filling, shipping, and maintaining of stock records in warehouse.

Freight-Traffic Consultant

Advises industries, business firms, and individuals concerning methods of preparation of freight for shipment, rates to be applied, and mode of transportation to be used. Consults with client regarding packing procedures and inspects packed or crated goods for conformance to shipping specifications to prevent damage, delay or penalties. Selects mode of transportation, such as air, water, railroad, or truck without regard to higher rates when speed is necessary. Confers with shipping brokers concerning export and import paper, docking facilities, or packing and marking procedures. Files claims with insurance company for losses, damages, and overcharges of freight shipments.

Dispatch Supervisor/Chief Dispatcher

Contacts customers or shippers to ascertain volume or quantities of products to be transported, reviews consumption records and forecasts consumer demands, and estimates peak delivery periods in order to plan and determine quantities. Prepares operating schedules and destinations for specific products. Reviews operating reports on receipt movements, withdrawals, deliveries and on-hand storage stocks to insure safe and efficient operations.

Assistant Agent

Prepares switching bills for local movement; maintains interchange records; maintains demurrage records, checks the yard daily; prepares revenue waybills and prepares agent's daily invoice of bills issued.

Safety Supervisor

Investigates and develops information pertaining to all vehicular accidents which result in fatality, injury requiring hospitalization or aggregate property damage; inspects general commodities terminals, stations, maintenance shops and special commodities district offices for compliance with company safety directives, compliance with OSHA, display of posters required by federal regulations, and unsafe practices and conditions; inspects equipment and driver's logs; determines what is needed to correct unsafe conditions and bring facilities into compliance with OSHA standards.

Transportation Inspector (Includes Customs)

Schedules periodic visits to passenger and freight-agent offices and ticket offices and examines their files to ascertain that current tariffs are in use; verifies samples of freight bills to ascertain that applicable tariffs have been used; informs and instructs agents on errors.

ADMINISTRATION

Assistant Terminal Manager

Hires personnel. Supervises. Deals with upper management and governmental agencies. Develops in-service training.

PROMOTION CRITERIA FOR 2nd LEVEL*:

Broad knowledge of industry; knowledge and some experience of level position;
Productivity (results on the job).

PROMOTION CRITERIA FOR 3rd LEVEL*:

Supervisor; communications; human relations; leaders; motivations; knowledge of total organization.

*Availability of a position

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Career Ladder for the Transportation and Warehousing Industry

*The movement is both horizontal and vertical.

Level 6 Positions*

CUSTOMER SERVICE/TRAFFIC

Assistant Vice President, Pricing

OPERATIONS

Distributor
Traffic Manager

ADMINISTRATION

Vice President, Operations
Physical Distributor
Assistant to President
General Manager

Level 5 Positions*

CUSTOMER SERVICE/TRAFFIC

Risk Manager
General/Regional Traffic Manager
Director of Pricing

OPERATIONS

Division Manager
Transportation Director
Director Intermodal Operations

ADMINISTRATION

Director of Transportation
Director of Distribution
Division Sales Manager
Division Manager
Regional/Branch Manager
Regional Manager
Assistant Vice President, Operations

Level 4 Positions*

CUSTOMER SERVICE/TITLE

Pricing Manager
Traffic Manager
Sales Department Manager

OPERATIONS

General Foreman
Transportation Superintendent
Dock Superintendent
Manager Intermodal Operations
Regional Transportation Coordinator
Assistant to Director of Safety
National Accounts Manager
Equipment Manager
Director of Maintenance
Manager-Branch/Terminal

ADMINISTRATION

District or Division Manager

Level 3 Positions*

CUSTOMER SERVICE/TRAFFIC

Tariff Inspector
Rate and Service Manager
Assistant Traffic Manager
Account Representative
Customer Services Representative
Senior Rate Clerk
Assistant Pricing Manager
Office Management
Market Analyst

OPERATIONS

Warehouse Supervisor/Dock Foreman
Freight-Traffic Consultant
Dispatch Supervisor/Chief Dispatch
Shipping and Receiving Foreman
    (see level 2 job description)
Safety Supervisor
Transportation Inspector
    (includes Customs)

ADMINISTRATION

Assistant Terminal Manager

Level 2 Positions*

CUSTOMER SERVICE/TRAFFIC

Reservation Agent
Passenger Representative
Rate Analyst
Traffic Agent
Salesperson
Containerization Clerk
Intermodal Yard Supervisor

OPERATIONS

Dispatcher
    (Train, Private Flight, Motor Carrier)
Dock Foreman
Shop Foreman
Schedule Analyst
Shipping and Receiving Foreman
Inventory Control Clerk
Traffic Coordinator/Route Clerk
Route Coordinator
Yard Master

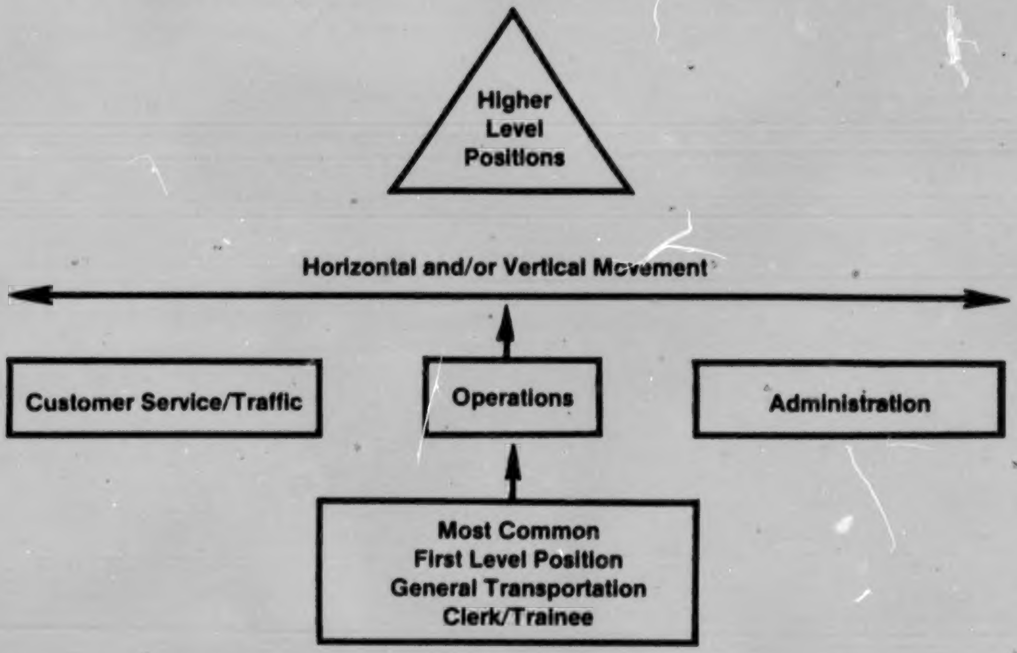
Level 1 Positions*

CUSTOMER SERVICE/TRAFFIC

- Tracing Clerk
- Ticket Seller/Agent
- Sales Trainee
- Over/Short Damage Clerk
- Transportational Booking Clerk
- Documentation and Booking Clerk
- Traffic Clerk
- Rate Clerk (Apprentice)
- Billing Clerk (Office)

OPERATIONS

- Shipping and Receiving Clerk
- Flight Attendant
- Supercargo Freight Clerk
- Baggage and Mail Agent
- Receiving Checker
- Loan Coordinator
- Route Clerk
- Log Clerk
- Permit and Licensing Clerk


Higher Level Positions
Horizontal and/or Vertical Movement
Customer Service/Traffic
Operations
Administration
Most Common First Level Position General Transportation Clerk/Trainee

APPENDIX

The following is a list of the Transportation and Warehousing jury of business executives and the firms they represent.

Mr. R. H. Curlette
General Manager, Traffic/Transportation
The Ceco Corporation
5601 W. 26th St.
Chicago, IL 60650

Mr. Richard Marek
Transportation Manager
Intercraft Industries Corporation
1840 N. Clybourn Avenue
Chicago, IL 60614

Mr. Ronald P. Formento
President
Transport Drivers, Inc.
700 S. Desplaines
Chicago, IL 60607

Mr. Clyde G. Knoppe
President
Metropolitan Transport Services
2 Salt Creek Lane
Hinsdale, IL 60521

Mr. Randolph E. Yeargin
District Sales Manager
Spector Freight System, Inc.
200 N. Mannheim Rd.
Hillside, IL 60162

Mr. Gerald Washington
Assistant Manager, Stations
Santa Fe Railway Co.
80 E. Jackson Blvd.
Chicago, IL 60604

Mr. Carter M. Harrison
Executive Director
American Society of Traffic/Trans.
547 W. Jackson Blvd.
Chicago, IL 60606

Ms. Joan Oswald
Manager, Commercial Accounts
Spector Freight Systems, Inc.
200 N. Mannheim Rd.
Hillside, IL 60162

Mr. Roger B. Gordon
Superintendent Intermodal Operations
Chicago and Northwestern Transportation Co.
500 W. Madison St.
Chicago, IL 60606

Mr. James Houser
EXOPX (Manager of Personnel for Executive Office)
United Airlines
P.O. Box 66100
Chicago, IL 60666

Mr. Jay Lumb
Manager, Field Operations
Continental Can Company
5401 W. 65th St.
Chicago, IL 60638

Ms. Betty McCauley
Traffic Manager
Moore-McCormack Lines
230 N. Michigan Ave.
Chicago, IL 60601

Mr. Tom Wagner
Director of Employee Relations
Spector Freight Systems, Inc.
1050 Kingery Highway
Bensonville, IL 60106

Ms. Joan Micklow
Shipping Supervisor
Clark Equipment Company
5024 W. 122nd St.
Alsip, IL 60658

Mr. Laurence D. Ahearn
Production and Traffic Control
James H. Rhodes and Company
2825 W. 31st St.
Chicago, IL 60623

Mr. Gilbert Green
Traffic Manager
Midas Muffler
4101 W. 42nd Pl.
Chicago, IL 60632

Mr. Patrick J. Moody Jr.
Regional Manager
Yellow Freight Systems
4950 W. 39th St.
Cicero, IL 60650

Mr. Michael V. Norris
Division Operations Assistant
Yellow Freight Systems
10990 Roe Avenue
Overland Park, Kansas 66207

Mr. Ray D. Nelson
Manager Technical Training
Chicago, Milwaukee, St. Paul and Pacific Railroad Company
352 Union Station Building
516 W. Jackson Blvd.
Chicago, IL 60606

Mr. Ambrose Cullen
Director of Safety
Cresco Lines, Inc.
10048 S. California Ave.
Evergreen Park, IL 60642

Mr. Floyd Stone
Traffic Manager
Midwest, National Can Corporation
8101 Higgins Road
Park Ridge, IL 60631

INSTRUCTIONAL AREA AND COMPETENCY	Competency No.	TRANSPORTATION AND WAREHOUSING GUIDE			GENERAL MARKETING GUIDE		
		General Transportation Clerk/Trainee					
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
COMMUNICATIONS Knowledges of or Understanding that: How to suggest changes to management.	093	5	37		2	12	GG-18
Knowledge of or Understanding that: How to use written communications in forms and reports.	094	12	3	TW-13			
Knowledge of or Understanding that: How to address other people in a business-like manner whether they are customers, fellow employees, supervisors or management.	096	5	2		11	3	GG-7
Knowledge of or Understanding that: The approaches which can be used in assigning duties and delegating authority so that everything is completely clear.	100	25	8	TW-15			
Knowledge of or Understanding that: When to keep communications confidential.	11	22	4	TW-18			
Knowledge of or Understanding that: To control grievances within the organization, employees should be given timely information concerning policies and procedures.	106	9	1	TW-17			
Knowledge of or Understanding that: Communications in assigning work means a constant striving for clarity.	109	29	7	TW-20			
Knowledge of or Understanding that: Since interpretations placed on the spoken work vary with different people, one must be careful to speak so that correct interpretation can be made by individual listeners.	111	19	9		11	6	GG-1
Skill: In using the telephone correctly and most effectively.	114	12	3	TW-7			
Skill: In receiving or giving telephone orders, complaints and messages.	115	19	5	TW-10			
Skill: In satisfactorily handling customer inquiries for general information.	116	9	5	TW-8			
Skill: In interpreting company policies to customers.	117	25	5	TW-9			
Skill: In listening to and following directions.	119	1	1		1	1	GG-9
Skill: In using the terminology of distribution and developing a vocabulary descriptive of the product or service being sold.	120	33	N	TW-1			
Skill: In effective use of speech and vocabulary.	122	16	8		10	3	GG-4
Skill: In interpreting management's policies to employer and employee's problem to management.	124	29	8	TW-19			
Skill: In preparing forms legibly so that errors in quantities, shipping, pricing information, etc. can be eliminated.	125	3	13	TW-14			
Skill: In communicating effectively with customers, co-workers, and supervisors.	127	2	12		6	2	GG-7
Skill: In listening to customer's names and addresses and writing them	130	12	8		9	7	GG-12
Skill: In determining the reason for a customer complaint on billing, adjusting the complaint and tactfully informing the customer of the adjustment.	136	25	3	TW-11			
Skill: Ability to talk clearly and pleasantly conveying spirit and enthusiasm in one's speech.	137	25	14	TW-3			
Skill: Ability to convey directions and instructions clearly to employees.	139	15	10	TW-21			
Attitude: That the ability to communicate skillfully in good English is essential to a person's business advancement.	144	9	4	TW-16			
Attitude: That poor or awkward grammar lowers company personnel, company image and value of the service in the estimation of the customer.	145	33	N	TW-4			
Attitude: An awareness that the voice can be used to express conviction and convey confidence.	150	35	N	TW-6			
Attitude: That the tone of voice can express sincere welcome and eagerness to be of service.	151	19	11		6	11	GG-5
Attitude: An appreciation of the value of correct enunciation and pronunciation in speaking.	152	37	8	TW-5			

INSTRUCTIONAL AREA AND COMPETENCY	Competency No.	TRANSPORTATION AND WAREHOUSING GUIDE General Transportation Clerk/Trainee			GENERAL MARKETING GUIDE		
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
Attitude: That by listening "with a sensitive ear" one can often detect true sources of complaints or grievances among company personnel.	157	37	4	TW-12			
Attitude: An awareness that nothing is quite so important or contagious as enthusiasm for the company, for the service and for customers.	158	19	N	TW-22			
Attitude: A belief that an important phase of management's responsibility in any organization is communication.	159	14	5		3	5	GG-19
Attitude: Belief that communication must be a two-way process between management and employees.	160	6	7		4	7	GG-17
Attitude: A realization that even in the most skillfully constructed communications misinterpretations will develop.	161	29	7		14	13	GG-14
Attitude: A realization that first impressions are important to the business and last impressions are the longest remembered.	163	31	N	TW-23			
Attitude: Awareness that certain thoughtlessly used terms or words can be misinterpreted by the listener.	164	34	2	TW-2			
Attitude: A belief that communications between the various departments and divisions within a store will result in a more efficient operation with mutual benefits to all.	168	29	N		8	7	GG-16
Skill: In writing forms with clarity and accuracy is critical.	1400	5	N	TW-24			
HUMAN RELATIONS							
Knowledge of or Understanding that: The factors which appear to affect employee morale.	262	46	N	TW-13			
Knowledge of or Understanding that: How to dress appropriately for the job and maintain a well-groomed appearance.	263	29	3	TW-1			
Knowledge of or Understanding that: How to build morale in employees.	264	46	N	TW-17			
Knowledge of or Understanding that: How to recognize the accomplishments of others.	265	29	9	TW-28			
Knowledge of or Understanding that: How to develop and maintain a pleasant working environment.	266	13	N		14	22	GG-22
Knowledge of or Understanding that: How to be orderly and systematic.	267	2	3		3	5	GG-2
Knowledge of or Understanding that: How to show an interest in others.	268	38	N	TW-2			
Knowledge of or Understanding that: How to build sound working relationships in "forced" associations.	269	34	N	TW-7			
Knowledge of or Understanding that: How to motivate others for best performance.	270	45	9	TW-23			
Knowledge of or Understanding that: The evidence of poor morale-high personnel turnover, numerous grievances, increase absenteeism and tardiness, restriction of output and tardiness.	271	56	N	TW-14			
Knowledge of or Understanding that: Morale as being the term frequently used to describe employee attitudes toward their jobs, employer and fellow employee.	272	41	N	TW-6			
Knowledge of or Understanding that: Supervisors or managers accomplish results by encouraging employees to work toward mutually beneficial objectives.	273	46	7	TW-22			
Knowledge of or Understanding that: A positive attitude is usually reflected in one's work.	274	4	1		6	4	GG-12
Knowledge of or Understanding that: The supervisor must help new employees adjust to their jobs, seeing that they are trained for the job and that they become acquainted with fellow employees.	275	24	7	TW-27			
Knowledge of or Understanding that: Human relations in business organizations consists of an inter-dependence with fellow employees, supervisors and customers.	276	32	N	TW-9			
Knowledge of or Understanding that: Personnel usually understand and comply more readily with policies and procedures which they have helped develop.	277	56	N	TW-18			

INSTRUCTIONAL AREA AND COMPETENCY	Competency No.	TRANSPORTATION AND WAREHOUSING GUIDE			GENERAL MARKETING GUIDE		
		General Transportation Clerk/Trainee					
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
Knowledge of or Understanding that: The ways to effectively handle difficult customers.	280	16	5	TW-10			
Skill: In developing and maintaining harmonious relationships with other employees.	281	24	5		19	8	GG-15
Skill: In working cooperatively with fellow employees, supervisors, and management and being aware of their needs and motivations.	283	13	5		7	3	GG-24
Skill: In maintaining an objective point of view in problem situations.	284	7	8	TW-5			
Skill: In maintaining good health for effective job performance.	285	46	13		11	2	GG-3
Skill: In developing personality traits necessary for successful job performance.	286	29	N		16	16	GG-6
Skill: In representing the business favorably to customers and outside business associates.	287	13	8	TW-11			
Skill: In adapting to the personality and needs of customers.	288	51	N	TW-8			
Skill: In avoiding misrepresentation of people, products and policies.	289	20	5		6	13	GG-17
Skill: In selecting the right person to do a job, giving clear instructions and seeing that instructions are properly carried out.	290	54	N	TW-25			
Skill: In exercising self-control during trying situations.	294	16	1		2	7	GG-7
Skill: In accepting criticism and turning it into a character-building element.	295	7	5		16	2	GG-9
Skill: In demonstrating initiative and creativity.	296	51	2	TW-4			
Skill: In adjusting to change.	301	20	N		7	11	GG-11
Skill: Ability to understand one's self.	302	20	3		14	20	GG-1
Skill: In generating enthusiasm toward people.	303	38	8	TW-3			
Attitude: That the store's personnel policies are established for the benefit of the store and the employee.	308	29	18		7	8	GG-23
Attitude: That next to job performance, human relations is an employee's greatest responsibility.	309	34	15		21	1	GG-19
Attitude: That the worker's satisfactory job performance includes not only what he/she does, but also how they influence other people, whether good or bad.	310	29	11		22	12	GG-18
Attitude: That honesty and integrity are personality traits necessary in job situations such as record-keeping, time-keeping and stock-keeping in addition to jobs that require working with money.	312	10	6		1	12	GG-5
Attitude: An awareness that understanding others and one's self is basic to working harmoniously together.	313	41	N		20	12	GG-13
Attitude: A feeling that the effective supervisor must be a leader whose job is to achieve results through other people.	315	61	6	TW-24			
Attitude: An awareness that an employee must be willing to accept and adjust to change.	316	4	9		5	2	GG-10
Attitude: An awareness of the necessity to perform tasks in addition to one's job responsibilities when situations necessitate.	317	19	19		16	2	GG-8
Attitude: A belief that a supervisor should set an example of personal work habits and character which employees can emulate.	318	46	15		7	17	GG-25
Attitude: An awareness that good personal appearance helps create effective customer impressions.	319	42	15		11	12	GG-20
Attitude: A feeling that good human relations within a company build good public relations.	320	57	N	TW-12			
Attitude: An awareness that good human relations improve employee morale by encouraging cooperation, generating happiness and creating harmony.	321	61	N		16	17	GG-21
Attitude: An awareness that good human relations helps increase production by stimulating interest and creativeness in employees.	322	61	N	TW-21			
Attitude: A willingness to accept and put into practice the planned policies and procedures of management.	325	20	2	TW-19			
Attitude: An awareness that good human relations depends on the personality factor and the adjustment of personalities.	326	60	N	TW-20			

INSTRUCTIONAL AREA AND COMPETENCY	Competency No.	TRANSPORTATION AND WAREHOUSING GUIDE			GENERAL MARKETING GUIDE		
		General Transportation Clerk/Trainee					
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
Attitude: A realization that employees' ideas often prove beneficial when incorporated into business operations.	327	46	20	TW-29			
Attitude: A realization that employee morale is influenced by the supervisor's attitude.	328	51	15	TW-16			
Attitude: A recognition that training contributes to the understanding by supervisors of personnel management and other managerial functions which they must perform.	330	60	N	TW-26			
Attitude: An awareness that motivation is closely connected with communication.	331	58	15	TW-15			
Attitude: That time spent training assistant managers (potential store managers) is worthwhile to the future of the business.	332	38	6	TW-30			
Skill: In treating others as individuals.	1500	24	10	TW-31			
Skill: In working cooperatively with other persons outside the firm such as suppliers, advertisers and community representatives.	1501	34	14	TW-33			
Skill: In demonstrating initiative in dealing with customers, other employees and managers.	1502	38	N	TW-34			
Skill: In serving customers courteously and represent the firm favorably.	1503	13	8	TW-35			
Skill: In establishing and maintaining credibility with customers, coworkers, employees and managers.	1504	24	N	TW-36			
Skill: In adjusting to the demands of job requirements, such as deadlines, pressures and conflicts.	1505	10	12	TW-37			
Skill: Deal with people both internally and externally (over the phone).	1506	41	N	TW-38			
Skill: Treat customers as individuals, get to know them.	1507	60	16	TW-31, 32			
Attitude: That good work habits, such as punctuality, orderliness, and patience are important when working for a company.	1508	4	11	TW-39			
Attitude: That appropriate ethics such as integrity and honesty are important when working for a company.	1509	1	2	TW-40			
Attitude: That a positive attitude must be maintained toward individual responsibilities and/or department and company operations.	1510	16	2	TW-41			
Attitude: That one must assume responsibility for individual actions and/or department and company operations.	1511	7	4	TW-42			
Attitude: That one must be dependable in the work environment.	1512	7	8	TW-43			
Attitude: Must be motivated since they are dealing with customers by voice only.	1513	54	N	TW-44			
Knowledge of or Understanding that: Success or failure depends not alone on technical proficiency, but on quality of interpersonal relations as well.	1514	58	N	TW-45			
Knowledge of or Understanding that: The ways to reinforce positive behavior and provide constructive criticism.	1515	46	N	TW-46			
MANAGEMENT							
Knowledge of or Understanding that: The company's procedures for evaluating employees.	610	28	25	TW-4			
Skill: Ability to determine in various situations the most efficient way to get the job accomplished.	695	10	19	TW-9			
Skill: In planning and organizing work.	723	2	8		3	4	GG-4
Skill: Ability to tactfully identify mistakes employees have made and help them constructively correct them.	729	24	N	TW-5			
Skill: Ability to think ahead and plan for any emergencies that might arise.	731	18	N	TW-10			
Attitude: A belief that each employee should be made to feel his/her efforts are really appreciated.	740	26	26		1	3	GG-2
Attitude: A belief that there should be a constant and intelligent effort on the part of management to be absolutely fair in every policy and every practice.	743	21	28	TW-2			

INSTRUCTIONAL AREA AND COMPETENCY	**Competency No.**	**TRANSPORTATION AND WAREHOUSING GUIDE**			**GENERAL MARKETING GUIDE**		
		General Transportation Clerk/Trainee					
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		**Employees Interviewed**	**Business Executive Jury**	**Page #**	**Employees Interviewed**	**Business Executive Jury**	**Page #**
Attitude: That management, supervisors and employees require a framework of policies and procedures within which to operate.	749	24	22	TW-3			
Attitude: An awareness that to improve delivery service, transactions should be recorded accurately and legibly and delivery dates promised carefully.	756	4	28	TW-11			
Attitude: That lines of authority should be followed, so that a department head or supervisor's position may not be weakened by management dealing directly with employees on matters that are logically in the supervisor's domain.	759	14	22	TW-1			
Attitude: That a good supervisor must also be an effective teacher or trainer.	768	21	25		1	1	GG-1
Attitude: That careful scheduling and organization of workloads help maintain high employee morale and work performed according to schedule.	782	28	N	TW-8			
Attitude: That in order to be best prepared for future management responsibilities, trainees must be willing to work and train in various capacities within the company operation.	789	6	22	TW-6			
Attitude: That time spent training management trainees is worthwhile to the future of the business.	790	21	N	TW-7			
Knowledge of or Understanding that: Company employee evaluation policies and procedures.	1201	10	17	TW-12			
Knowledge of or Understanding that: Plans and policies related to customer service.	1202	14	1	TW-13			
Knowledge of or Understanding that: Advantages and disadvantages of types of carrier services (motor, rail, air, U.P.S., etc.).	1203	14	7	TW-14			
Skill: Ability to determine equipment needs.	1204	26	8	TW-15			
Skill: Ability to route shipments by appropriate carrier and route.	1205	4	3	TW-16			
Skill: Ability to set up carrier pickup and delivery sites.	120[illegible]	10	11	TW-17			
Skill: Ability to prepare shipping records as they relate to billing, inventory control and other related functions.	1207	8	11	TW-18			
Skill: Ability to prepare various documents such as bills of lading, freight bills, load manifests, delivery receipts, etc.	1208	1	3	TW-19			
Skill: Ability to classify freight in order to determine rates.	1209	16	8	TW-20			
Skill: Ability to answer customer questions on rates, routing, packaging, etc.	1210	7	5	TW-21			
Skill: Ability to calculate freight charges on shipments moving over more than one carrier.	1211	14	7	TW-22			
Skill: Ability to calculate rates on quantity and LTL shipments.	1212	21	8	TW-23			
Knowledge of or Understanding that: The company's chain of command/authority.	1213	5	N	TW-24			
Attitude: An awareness of the part delivery service plays in promoting good public relations for the company.	1214	18	N	TW-25			
MARKETING/ECONOMICS							
Knowledge of or Understanding that: How businesses arrive at profit.	1000	1	1		2	2	GG-1
Attitude: A belief that personal advancement and prosperity can be determined by the contribution made to the success of the business employed in.	1001	2	2	TW-1			
Knowledge of or Understanding that: The student should be able to understand the flow of service from the producer to the point of sale—channels of distribution.	1018	3	N	TW-2			
Knowledge of or Understanding that: The student should be aware of all the businesses that take part in the movement of goods from the producer to the point of sale and the work they perform—channels of distribution.	1019	4	N	TW-3			

INSTRUCTIONAL AREA AND COMPETENCY	Competency No.	TRANSPORTATION AND WAREHOUSING GUIDE			GENERAL MARKETING GUIDE		
		General Transportation Clerk/Trainee					
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
MATHEMATICS							
Knowledge of or Understanding that: A company's gross margin should cover operating expenses and provide a percentage of profit.	350	41	N	TW-5			
Skill: In multiplying and extending figures with facility.	357	7	2		1	1	GG-3
Skill: In adding columns of figures with facility.	358	23	16		2	2	GG-1
Skill: In using and interpreting transportation rate schedules in determining transportation charges.	366	27	1	TW-3			
Skill: In accurately calculating the exact amount of a customer's purchase.	374	12	12	TW-1			
Skill: In using such shipping terms as F.O.B. and C.O.D.	378	41	N	TW-4			
Attitude: That carefully calculating the exact amount of a customer's bill will prevent losses.	390	4	N	TW-2			
OPERATIONS							
Knowledge of or Understanding that: The company's billing procedures.	595	27	N	TW-11			
Knowledge of or Understanding that: How to handle and record customer payments of bills.	600	52	N	TW-12			
Knowledge of or Understanding that: How to discuss delinquent accounts with a customer, keeping that person's goodwill.	603	59	N	TW-14			
Knowledge of or Understanding that: Proper care of store equipment and proper stock arrangements can help prevent accidents.	615	27	N		3	3	GG-1
Knowledge of or Understanding that: Seemingly small savings in some expense areas can mean a substantial gain in profits.	618	52	21	TW-8			
Knowledge of or Understanding that: Procedures for reporting and handling damaged merchandise.	634	23	16		7	6	GG-13
Knowledge of or Understanding that: The procedures involved in checking merchandise in against an invoice.	638	27	N	TW-2			
Knowledge of or Understanding that: The procedures for handling incorrect amounts or types of merchandise received.	639	52	N	TW-6			
Knowledge of or Understanding that: The uses of forms and reports necessary in stockkeeping.	640	59	N		12	7	GG-12
Knowledge of or Understanding that: The various modes of transportation used in shipping merchandise from vendor to store.	646	41	18	TW-1			
Knowledge of or Understanding that: The terms used in connections with the merchandise receiving and marketing process such as buyer's order, invoice, apron, price code, billing check, direct check, receiving record, bill of lading, vendor and vendee.	647	41	18		12	N	GG-3
Knowledge of or Understanding that: Various types of storage - within store (stockroom), outside-the-store (warehouse) and returned goods.	648	52	N	TW-7			
Knowledge of or Understanding that: How to take care of employees' and customers' accidents in the store.	660	N	41		12	N	GG-3
Knowledge of or Understanding that: How to properly handle records for the effective control of the company's operation.	668	27	N	TW-9			
Knowledge of or Understanding that: How to unload delivery trucks quickly and efficiently placing them in their proper position in the stock area.	669	15	N		9	12	GG-8
Skill: In determining shipping and receiving discrepancies and taking the proper action.	701	15	12	TW-3			
Skill: In determining routing and quantities for transportation of goods to keep transportation costs at a minimum.	705	41	N	TW-16			
Skill: In following through on non-delivered or lost merchandise.	706	23	18	TW-5			
Skill: In accurately checking in merchandise against an invoice.	708	20	N	TW-4			
Attitude: That proper records of collections must be maintained.	738	41	N	TW-13			

INSTRUCTIONAL AREA AND COMPETENCY	Competency No.	TRANSPORTATION AND WAREHOUSING GUIDE			GENERAL MARKETING GUIDE		
		General Transportation Clerk/Trainee					
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
Attitude: Belief that employees must be trained with regard to safety measures and accident prevention.	751	34	N		10	7	GG-6
Attitude: A realization that expenses are an influential factor in business profitability.	752	34	N	TW-10			
Attitude: That complete records should be kept of all incoming merchandise for company protection.	761	20	25		8	7	GG-9
Attitude: That employees must be made alert to property protection and company security by supplying them information concerning fire and general safety regulations and procedures.	788	41	N		6	5	GG-7
Attitude: That the health and safety of the customer employee depend on adherence to policies and procedures.	798	34	N	TW-15			
Knowledge of or Understanding that: Of advantages and disadvantages of types of carrier, services (motor, rail, air, U.P.S., etc.).	1106	18	12	TW-17			
Knowledge of or Understanding that: Although management plans expense control budgets, the actual control must be carried out by the cooperative effort of all company employees.	1107	47	N	TW-18			
Knowledge of or Understanding that: Carrier and union regulations when loading freight.	1109	56	21	TW-19			
Knowledge of or Understanding that: Sound loading techniques based on nature of the goods, packaging, mode of transportation, balancing and bracing, load limits, etc.	1110	30	7	TW-20			
Knowledge of or Understanding that: The uses of pallets, skids, ramps, and other supportive equipment in the loading process.	1111	23	7	TW-21			
Knowledge of or Understanding that: Checking procedures when receiving shipments—actual count, spot check, quality control, etc.	1112	4	21	TW-22			
Knowledge of or Understanding that: Maintaining public relations and goodwill of present clients through activities such as servicing accounts, communicating with clients, etc.	1114	4	9	TW-23			
Knowledge of or Understanding that: Procedures and time limits for filing claims of damage or over-charge.	1115	4	9	TW-24			
Knowledge of or Understanding that: Procedures in tracing shipments with various carriers.	1117	2	N	TW-25			
Knowledge of or Understanding that: Demonstrate knowledge of various types of material handling equipment, (fork trucks, pallet loaders, etc.) and supportive materials, (pallets, shelving, etc.).	1120	52	21	TW-26			
Skill: Read and process the air bills (they do not fill them out).	1121	52	21	TW-27			
Knowledge of or Understanding that: Of the functions of the Interstate Commerce Commission.	1122	59	N	TW-28			
Knowledge of or Understanding that: Demonstrate understanding of when to notify supervisor when there is insufficient materials to fill order or requistion.	1125	18	N	TW-29			
Knowledge of or Understanding that: Demonstrate understanding of when to contact customer if order or requisition is unclear, incomplete, or there are significant price changes.	1126	4	N	TW-30			
Knowledge of or Understanding that: Of carrier regulations on size, weight, marking and packaging of shipments.	1127	1	12	TW-31			
Knowledge of or Understanding that: Of special packaging requirements for export shipping.	1129	59	N	TW-32			
Knowledge of or Understanding that: How to avoid accidents by following predetermined traffic patterns around a warehouse.	1133	34	21	TW-33			
Knowledge of or Understanding that: The procedures for filing claims for merchandise damages, shortages and overcharges on carriers or manufacturers.	1134	10	N	TW-24			
Knowledge of or Understanding that: Various laws dealing with freight transportation including shipment of hazardous materials.	1135	10	3	TW-34			
Knowledge of or Understanding that: Understand the Bills of Lading (air bill).	1136	27	1	TW-35			

INSTRUCTIONAL AREA AND COMPETENCY	Competency No.	TRANSPORTATION AND WAREHOUSING GUIDE			GENERAL MARKETING GUIDE		
		General Transportation Clerk/Trainee					
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
Skill: Ability to prepare and distribute copies of the bill of lading.	1137	15	12	TW-35			
Skill: Ability to route shipments by appropriate carrier and route.	1138	10	9	TW-36			
Skill: Ability to set up carrier pickup and delivery sites.	1139	20	18	TW-37			
Skill: Ability to prepare shipping records as they relate to billing, inventory control, and other related functions.	1140	12	12	TW-38			
Skill: Ability to prepare various documents such as bills of lading, freight bills, load manifests, delivery receipts, etc.	1141	7	5	TW-38			
Skill: Ability to classify freight in order to determine rates.	1142	34	16	TW-39			
Skill: Ability to calculate freight charges on shipments moving over more than one carrier.	1143	41	N	TW-40			
Skill: Ability to calculate rates on quantity and LTL shipments.	1144	41	N	TW-41			
Skill: Ability to assist in loading procedure when required by a carrier.	1145	47	N	TW-42			
Skill: Ability to accurately check quantity and condition of shipments.	1146	10	N	TW-43			
Skill: Ability to prepare receiving records and documents noting exceptions, such as damage, shortage, incorrect merchandise, etc.	1147	7	10	TW-44			
Skill: Ability to approve carriers receipts with any exceptions noted.	1148	41	N	TW-43			
Skill: Ability to determine or pinpoint parties responsible for, or causes of, damage.	1149	59	N	TW-45			
Skill: Ability to contact seller or shipper about errors in or damage to shipments with various carriers.	1150	34	25	TW-45			
Skill: Trace lost or misplaced or stolen freight items.	1152	52	N	TW-46			
Skill: Files and retrieves filed information.	1153	52	N	TW-47			
PRODUCT AND/OR SERVICE TECHNOLOGY							
Knowledge of or Understanding that: The delivery area served by the store, delivery schedules and delivery charges.	503	N	4	TW-1			
Skill: In interpreting service guarantees and directions to customers.	554	N	4	TW-3			
Skill: In quoting to customers accurate delivery dates and charges.	556	1	1	TW-2			
Attitude: Belief that adequate service will help increase sales and promote better customer relations.	587	N	4	TW-4			
Attitude: A belief that adequate service information will build customer confidence in the service as well as in the company.	588	N	2	TW-5			
SELLING							
Knowledge of or Understanding that: The ways to handle customer complaints according to company policy.	823	N	10	TW-13			
Knowledge of or Understanding that: The company's policies, terms, and credit plans.	824	N	14	TW-1			
Knowledge of or Understanding that: Department and operation locations within the company.	826	N	10	TW-10			
Knowledge of or Understanding that: Customer loyalty can be built with timely and friendly services.	828	N	6	TW-6			
Knowledge of or Understanding that: How to handle mail or telephone orders for services.	835	1	14	TW-9			
Skill: In remembering customer's names when serving them.	862	N	2	TW-11			
Skill: In showing a genuine interest in the customer's problem.	867	N	3	TW-2			
Skill: Ability to tactfully handle difficult customers.	897	3	6	TW-4			
Skill: Ability to serve customers in the manner or style that management desires.	899	2	10	TW-7			
Attitude: A feeling that each customer is an "individual."	918	3	4	TW-5			
Attitude: A feeling of sincere interest in customers and their problems.	920	N	12	TW-3			
Attitude: A strong interest in the merchandise or service being sold.	922	7	10	TW-12			

INSTRUCTIONAL AREA AND COMPETENCY	Com-pe-tency No.	TRANSPORTATION AND WAREHOUSING GUIDE: General Transportation Clerk/Trainee			GENERAL MARKETING GUIDE		
IMPORTANT NOTE: **N = Not ranked essential by jury participants.**		Employees Interviewed	Business Executive Jury	Page #	Employees Interviewed	Business Executive Jury	Page #
Attitude: That sufficient understanding of a firm's policies is necessary to truly represent the viewpoint of management to customers.	932	N	1	TW-8			
Attitude: That one should give the best customer service with the customer always first in mind.	957	N	6		1	1	GG-1

31

Cluster Instructional Objective: ABILITY TO UNDERSTAND THE IMPORTANCE OF GOOD TECHNIQUES IN COMMUNICATION

TW-1

2 Communications

What Does the Competent Marketing Employee Do?

120-Skill

In using the terminology of distribution and developing a vocabulary descriptive of the service being sold.

Common to
Finance and Credit

OTHER CLUSTER COMPETENCIES

164-Attitude

Suggested Learning Activities

Have students prepare a list of 15 terms that are unique to their career area. Then beside each term, define it. Have students with similar career objectives compare their lists. The students should adjust their list by writing in an "addition column" any new words found on another students' list. Slang words are acceptable. Their lists should be submitted to you.

Have students select an item or service from their training station that requires, or could require, some type of personal selling. Have the students give a short presentation on the item using as many terms as possible when discussing the item. Role play with a student. Have the student be the transportation clerk/trainee. Give the student (clerk) an unfamiliar service. As the customer, you should be very familiar with the service. It should become obvious to the student how hard it is to sell a service when one has insufficient service knowledge and consequently improper vocabulary.

References

LAP 2-120

Communications in Marketing
Chapter 3
2nd Edition

Traffic World's
Questions and Answers
pp. 300-303

Your Job in Distribution
p. 283

Cluster Instructional Objective: ABILITY TO UNDERSTAND THE IMPORTANCE OF GOOD TECHNIQUES IN COMMUNICATION

What Does the Competent Marketing Employee Do?

164-Attitude

Awareness that certain thoughtlessly used terms or words can be misinterpreted by the listener.

Common to
  Food Marketing
  General Retail Merchandising
  Finance and Credit

OTHER CLUSTER COMPETENCIES

120-Skill

Suggested Learning Activities

List the following words on a piece of paper and have the students determine the ways these words can be misinterpreted by a customer.

1. F.O.B.
2. Satisfaction guaranteed
3. Cost
4. Piggy back
5. Best buy
6. E.O.M.
7. Cash discount
8. On consignment

From a newspaper, have students list the words from any advertisement or headline the could be misinterpreted or misleading. Also, students can look for any grammatical errors.

Have students ask the English-Speech teacher to help them compile a list of 10 adjectives or phrases that could be taken different ways or have different meanings. You should set this up with the English-Speech teacher so the students will get the teacher's cooperation.

References

LAP 2-164

Retailing Principles and Practices
  Part 14
  7th Edition, 1981

Human Relations in Business
  Chapter 8

Fundamentals of Selling
  Chapter 5

Communications in Marketing
  Chapter 4

Cluster Instructional Objective: ABILITY TO DEMONSTRATE GOOD ORAL COOMUNICATIONS IN SPEECH AND VOCABULARY USAGE

TW-3

What Does the Competent Marketing Employee Do?

137-Skill

Ability to talk clearly and pleasantly, conveying spirit and enthusiasm in one's speech.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

OTHER CLUSTER COMPETENCIES

152-Attitude
145-Attitude

Suggested Learning Activities

Have the students read the following case and analyze the problem. Follow with a class discussion on how to convey spirit and enthusiasm in communications.

CASE: Joe Green raced his sister to answer the phone. "Hello," he gasped. Then, "Nah, he's not here...That's o.k.," he concluded. "Who was on the phone, Joe?" his mother asked. "I dunno," he muttered. "Someone calling for Bill." "You should have asked so Bill could have returned the call." "Oh, it was some girl. She can call back. Anyway, I have to go to work."

An hour later at work, Joe had to answer the phone. His boss wanted to know if he called the customer back with the information on the change in the rates. "Yeah, I called the customer," Joe said. "Yeah, I will write a follow-up letter to the customer, I guess."

Joe would like to be promoted to credit manager but his boss feels Joe should not be promoted. What do you think Joe's problem is and how would you solve it?

Tape record a conversation showing both enthusiasm and lack of enthusiasm. Have students react to the tape. Follow with examples to students on why it is important to talk clearly and pleasantly, conveying spirit and enthusiasm in one's speech.

References

LAP 3-137

Oklahoma Distributive
Education III

Communications in Marketing
    Chapter 4

Retail Selling
    Chapter 8

Fundamentals of Selling
    Chapter 3

Communications in Marketing
    Chapter 3
    2nd Edition

Retail Selling
    Chapter 9
    2nd Edition

Retailing Principles
and Practices
    Part 13
    7th edition,1981

Cluster Instructional Objective: ABILITY TO RELATE THE USE OF SPEECH AND VOCABULARY TO GOOD ORAL COMMUNICATION

TW-4

What Does the Competent Marketing Employee Do?

145-Attitude

That poor or awkward grammar lowers company personnel, company image and the value of the service in the estimation of the customer.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

Other Cluster Competencies

152-Attitude
137-Skill

Suggested Learning Activities

In a role-playing situation, have one student act as a customer approaching a salesperson who is demonstrating a product of the customer's (student's) choosing. The student acting as the salesperson should use incorrect grammar while demonstrating the product. Follow the demonstration with a discussion on the image conveyed. Ask the student (customer) whether the product would be purchased from this salesperson and why or why not.

Play tape recorded sales presentations for the class. Some of the presentations should be grammatically correct and some grammatically incorrect. Have students decide which presentation created the most favorable impressions and which products they would purchase.

Have a person from the speech area of the high school give a lecture on "How Good or Proper Grammar Creates Good Image." Follow with a class discussion.

As a group, the student will have a discussion on what they feel are misused words and phrases from their experiences.

References

LAP 3-145

Communications in Marketing
    Chapter 3
    2nd Edition

Communications in Marketing
    Chapter 4

Retailing Principles and Practices
    Part 56

Retail Selling
    Chapter 9
    2nd Edition

Fundamentals of Selling
    Chapter 3
    Part B

Retailing Principles and Practices
    Parts 13, 63
    7th Edition, 1981

Cluster Instructional Objective: ABILITY TO DEMONSTRATE GOOD ORAL COMMUNICATION IN SPEECH AND VOCABULARY USAGE

What Does the Competent Marketing Employee Do?

152-Attitude

An appreciation of the value of correct enunciation and pronunciation in speaking.

Common to
  Food Marketing
  General Retail Merchandising
  Finance and Credit

OTHER CLUSTER COMPETENCIES

137-Skill
145-Attitude

Suggested Learning Activities

Ask students to develop a list of the words from their reading assignments they find difficult to pronounce. At convenient intervals during the semester, have students write the words on the blackboard. Discuss with the students definitions and have them practice pronouncing the words. They should also use the words in sentences.

Ask a teacher from the speech department to talk to the class on the importance and value of correct enunciation and pronunciation. Supplement this presentation with a follow-up that applies to the business environment.

Acquire a tele-trainer from the telephone company. Have student role-play the following situation and record the student's conversation.

SITUATION:
Have students call to inquire about an advertised postion. Play the recording back to the class and listen for poor wording, poor enunciation, and poor pronunciation. Stress the importance of speaking correctly and the image it creates.

References

LAP 3-152

Retail Selling
  Chapter 8

Fundamentals of Selling
  Chapter 3, b

Communications in Marketing
  Chapter 4

Communications at Work
  Chapter 3

Retail Selling
  Chapter 9
  2nd Edition

Retailing Principles and Practices
  Part 13
  7th edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE HOW THE VOICE AND GESTURES AFFECT COMMUNICATIONS

TW-6

What Does the Competent Marketing Employee Do?

150-Attitude

An awareness that the voice can be used to express conviction and convey confidence.

Common to
    Food Marketing
    Finance and Credit

Suggested Learning Activities

Tape four or five radio commercials in the transportation and warehousing field. Try to record a variety of advertisements that use different voice approaches to advertise a product or service. Have students write a reaction statement to each commercial after you have played it back for them. Write their reactions on the board, both good and bad points. Then ask them what could be done in order to make the advertisement express conviction and convey confidence.

Prepare a written sales talk. Have several students record the written sales talk. Have them try to convey confidence and express conviction. Play the recording back to the class for their comments.

References

LAP 5-150

Oklahoma Distributive Education III
    Page 259, b

Fundamentals of Selling
    Chapter 3, b

Retail Selling
    Chapter 9

Retailing Principles and Practices
    Parts 14, 34
    7th Edition, 1981

Communications in Marketing
    Chapter 3
    2nd Edition

Cluster Instructional Objective: DEMONSTRATE CORRECT TELEPHONE USAGE TW-7

What Does the Competent Marketing Employee Do?

114-Skill

In using the telephone correctly and most effectively.

Common to
    Finance and Credit
    General Retail Merchandising

Suggested Learning Activities

Divide the class into small groups and have the groups compose a list of important qualities of a good phone voice.

1. Alertness
2. Expressiveness
3. Naturalness
4. Pleasantness
5. Distinctiveness

Role-play situations in the groups. Have students call information several times. Have the students space out the calls so they will get different operators. Have the students evaluate the "image" that the operator projected. They should evaluate the activity by the five important qualities of a good telephone voice.

References

LAP 9-114

Fundamentals of Selling
    Chapter 12

Retail Selling
    Chapter 26

Retail Merchandising
    Chapter 12

Communications in Marketing
    Chapters 2, 4
    2nd Edition

Retailing Principles and Practices
    Parts 13, 15, 23
    7th Edition, 1981

Warehousing--A Guide For Both Users and Operators
    Chapter 5

Cluster Instructional Objective: UNDERSTAND THE IMPORTANCE OF COMMUNICATING EFFECTIVELY WHEN DEALING WITH CUSTOMER INQUIRIES OR EXPLAINING STORE POLICIES

TW-8

Communications 2

What Does the Competent Marketing Employee Do?

116-Skill

In satisfactorily handling customer inquiries for general information.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

OTHER CLUSTER COMPETENCIES

117-Skill

Suggested Learning Activities

Discuss with students the following case problem:

Mr. Smith approached a transportation clerk in a Transportation and Warehousing firm and asked, "Who can I see to help me with a problem regarding my company's bill." The clerk answered, "I really don't know, but you might try asking the manager."

1. Was the clerk's answer satisfactory?
2. How would you answer this question?
3. What additional information should be given?

Have the students brainstorm a list of information they need to know to be able to satisfactorily help the customer. Have the students interview an employee to compare their list and add to it. Have the students make a booklet of this information (questions and answers) to use on the job.

References

LAP 20-116

Fundamentals of Selling
    Chapter 7

Retail Selling
    Chapter 29

Communications in Marketing
    Chapters 1, 4

Communications in Marketing
    Chapter 1
    2nd Edition

Customer Services
    Chapters 5, 6
    2nd Edition

Cluster Instructional Objective: ACQUIRES AN UNDERSTANDING OF THE IMPORTANCE OF COMUNICATING EFFECTIVELY DEALING WITH CUSTOMER INQUIRES OR EXPLAINING STORE POLICY

What Does the Competent Marketing Employee Do?

117-Skill

In interpreting company policies to customers.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

OTHER CLUSTER COMPETENCIES

116-Skill

Suggested Learning Activities

Have students list six questions about the company's policy statements that a customer might ask a credit representative. A source of assistance should be listed with the question of where the student could find out the answer if he/she did not know.

Example: Does your company extend credit to new customers?

Have students role-play a situation where a customer asks specific questions about a policy and the students must answer them.

References

LAP 20-117

Retail Selling
  Chapter 29

Customer Services
  Chapter 5, 6
  2nd Edition

Retailing Principles and Practices
  Part 32
  7th Edition, 1981

Wholesaling and Physical Distribution
  Chapter 3

Retail Selling
  Chapter 30
  2nd Edition

Warehousing--A Guide For Both Users and Operators
  Chapter 5

Cluster Instructional Objective: HAS AN UNDERSTANDING HOW TO IMPLEMENT DIRECTIONS AND THE PROPER USE OF THE TELEPHONE

What Does the Competent Marketing Employee Do?

115-Skill

In receiving or giving telephone orders, complaints and messages.

Common to
    Food Marketing
    Finance and Credit

Suggested Learning Activities

Lecture and discuss with students the importance of telephone techinques in receiving or giving telephone orders. Group students into pairs and have them sit back to back. Have one student build or draw a picture by asking questions of another student who has the telephone.

Using a tele-trainer, have students role-play the following situations:

1. You are placing a call to a customer about the merchandise your company is transporting. Give the customer the appropriate information.
2. A customer is calling you to confirm his/her shipment. It is part of your job to call the warehouse to verify that shipments are on schedule.
3. A customer is calling you and is very angry. He/She was late for an appointment because of a delay in your schedule.

References

LAP 24-115

Retail Selling
    Chapter 26

Communications in Marketing
    Chapter 2

Retail Merchandising
    Chapter 12

Retailing Principles and Practices
    Parts 30, 34
    7th Edition, 1981

Warehousing--A Guide For Both Users and Operators
    Chapter 5

Cluster Instructional Objective: CORRECTLY DEMONSTRATE HOW TO HANDLE COMPLAINTS THROUGH EFFECTIVE COMMUNICATION

TW-11

What Does the Competent Marketing Employee Do?

136-Skill

In determining the reason for a customer's complaint on billing, adjusting the complaint and tactfully informing the customer of the adjustment.

Common to
Food Marketing
Finance and Credit

Suggested Learning Activities

Have students obtain a copy of a local transportation and warehouse firm or their training station policies on handling customer billing complaints. Discuss these policies.

Assign students to small groups, have each group interview their transportation managers on how to handle complaints. Tape record their responses and play them for the class.

Have each student list the complaint which occurs most frequently at their company. Determine the cause for the complaint and what could be done to alleviate the number of complaints in the future.

References

LAP 25-136

Customer Services
Chapter 6
2nd Edition

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: ABILITY TO IDENTIFY TRUE REASONS FOR COMPLAINTS

What Does the Competent Marketing Employee Do?

157-Attitude

That by listening "with a sensitive ear" one can often detect true sources of complaints or grievances among company personnel.

Common to
- Food Marketing
- General Retail Merchandising
- Finance and Credit

Suggested Learning Activities

Have each student write on an incident where the customer was very angry and had the "what for" attitude because they were upset with the store. Then using the DICE method or another case problem solving method, have each student complete one or two such cases from the selected readings. Discuss with the students each step of the case problem approach to make sure that all facts, solutions, etc. are covered. Finish this exercise by exploring how a good transportation clerk can turn complaints into good customer relations through handling the complaint properly and trying to understand the customer's problem.

Give the students four or five reaction statements and have them write down a short answer. Then discuss with the students the short-range and long-range results of their reactions. Stress the fact that when most customers are angry they are not attacking the individual personally, but the individual's actions.

References

LAP 26-157

Retail Selling
Chapter 17

Retail Merchandising
Chapter 12, c

Basic Salesmanship
Chapter 7

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: ABILITY TO UNDERSTAND THE IMPORTANCE OF WRITTEN COMMUNICATIONS IN FORMS AND REPORTS

TW-13

2 Communications

What Does the Competent Marketing Employee Do?

094-Knowledge of/or Understanding that

How to use written communications in forms and reports.

Common to
Food Marketing
Finance and Credit

Suggested Learning Activities

Discuss with the students the following case:

Mr. Jones called yesterday and was very upset about his bill. He claimed there was an error on his bill. After checking his records, you determine the error and correct it. Now your boss has asked for a report on the problem, and he wants you to write a letter to Mr. Jones explaining the situation.

After discussing the situation, have the students write a report to the boss and a letter to Mr. Jones. The letters should be turned in to you.

References

LAP 27-094

Retail Selling
Chapters 14, 15

Retail Merchandising
Chapter 15

Communications in Marketing
Chapters 7, 8

Materials Handling
Traffic and Transportation
Parts 31, 32

Wholesaling and Physical Distribution
Chapter 5

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF WRITING SHIPMENT AND PURCHASE ORDERS ACCURATELY

TW-14

What Does the Competent Marketing Employee Do?

125-Skill

In preparing forms legibly so that errors in quantities, shipping, pricing information, etc. can be eliminated.

Suggested Learning Activities

Have students obtain examples of a shipping order. The students should then complete the following transactions:

1. Phillips & Son's at 1825 Vail Avenue, Greensboro, North Carolina, wants 3,000 tons of steel shipped to California on July 18, 1980. Their account number is 365.
2. Richmon Brothers at 365 Herrin, Madison Wisconsin, is shipping 1/2 load on June 21, 1980. Their account number is 19675.

Have students complete the following case: Terry Mason works in a transportation department. One afternoon shortly before he was ready to leave, a lot of customers were calling to ship goods. Terry didn't record the quantities and rates on the customers' orders. He decided to do this after the office closed. At 5:30 he started to fill in missing amounts. However, on one charge Terry could not remember the information to record on the customer's order.

Discuss why Terry's shortcuts failed. How will the mistakes affect his department.

References

LAP 29-125

Communications in Marketing
Chapters 1, 7
2nd Edition

Retail Selling
Chapter 11
2nd Edition

Materials Handling
Chapter 5

Wholesaling and Physical Distribution
Chapters 5, 7

Physical Distribution
Chapters 2, 3

Introduction to Wholesale Distribution
Chapter 3

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: ABILITY TO RELATE IMPORTANCE OF ASSIGNING DUTIES AND DELEGATING AUTHORITY

TW-15

Communications 2

What Does the Competent Marketing Employee Do?

100-Knowledge of/or Understanding that

The approaches which can be used in assigning duties and delegating authority so that everything is completely clear.

Common to
Food Marketing
Wholesaling

Suggested Learning Activities

Have students view the film "Instructions or Obstructions" Bureau of National Affairs, 1615 Fisher Lane, Rockville, Maryland 20852.

In small groups have students take a visit to a transportation and warehousing company and obtain approaches used in assigning duties and delegating authority within the company. Then students can write a paper summarizing the information gathered.

Have students develop an organizational chart for their training station. Then students can compare their chart with those of other class members. The students can discuss similarities and differences.

The following statements were made by a supervisor. Rewrite each so it is clear and tactful.

1. These unpacked boxes are cluttering the warehouse!
2. I wonder who I can get to work tommorow night.
3. Handle this re-routing of shipments!

References

LAP 34-100

Oklahoma Distributive Education III

Communications in Marketing
Chapter 4

Human Relations in Marketing
Chapters 4, 6, 8
2nd Edition

Communications in Marketing
Chapters 3, 7, 1
2nd Edition

Introduction to Wholesale Distribution
Chapter 2

TW-16

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF TRAINING OF OTHERS AND COMMUNICATION NECESSARY FOR ADVANCEMENT

2

Communications

What Does the Competent Marketing Employee Do?

144-Attitude

That the ability to communicate skillfully in good English is essential to a person's business advancement.

Common to
- Food Marketing
- General Retail Merchandising
- Finance and Credit

Suggested Learning Activities

Present a short lecture to students on why effective communication is important to advancement on the job. Then have students prepare a list of 20 actions indicative of good communications skills.

For example: "Voice is pleasing to hear, correctly pronounces each word. Has a good vocabulary."

Using transparencies, show the students two applications for employment--one prepared neatly using proper English and the other prepared in a haphazard fashion using improper English. Have students decide which applicant they would hire based on the ideas "communicated" by the application.

References

LAP 39-144

Communications in Marketing
  Chapter 4

Introduction to Wholesale Distribution
  Chapter 3
  Page 32

Cluster Instructional Objective: COMPREHEND THE IMPORTANCE OF CONTROLLING GRIEVANCES THROUGH COMMUNICATION

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
106-Knowledge of/or Understanding that	From selected readings, have students write the key points of the materials. Their paper should be submitted to you.	LAP 40-106
To control grievances within the organization, employees should be given timely information concerning policies and procedures.	Present a lecture to the students on the procedures organizations should follow so communication channels are kept open thus avoiding misunderstandings on policies and procedures.	Retailing Principles and Practices Parts 13, 53 7th Edition, 1981
Common to Food Marketing General Retail Merchandising Finance and Credit	Have students briefly outline the procedures their training station uses to control policy and procedure grievances within the organization.	Retail Merchandising Chapter 5
		Communications in Marketing Chapter 7
		Communications in Marketing Chapter 7 2nd Edition
		Warehousing--A Guide For Both Users and Operators Chapter 5

Cluster Instructional Objective: ABILITY TO RELATE WHY IT IS IMPORTANT TO KEEP COMMUNICATION CONFIDENTIAL AND HOW TO SUGGEST CHANGES TO MANAGEMENT

TW-18

2 Communications

What Does the Competent Marketing Employee Do?

102-Knowledge of/or Understanding that

When to keep communication confidential.

Common to
- Food Marketing
- General Retail Merchandising
- Finance and Credit

Suggested Learning Activities

Divide the class into small groups of 4-5 members. Discuss the following topics:
1. Importance of confidential communications
2. Dangers involved in communication leaks
3. Information that should be confidential
4. Why confidentiality is extremely important when dealing with credit.

After brief discussions (10-15 minutes) have the groups report their answers.

Have students brainstorm a list of communications which they believe should be kept confidential. Follow the brainstorming session with a discussion on what happens when employees reveal communications which should have been kept confidential. Have students do the following case problem:

YOU are an employee for a transportation company in town and the manager has communicated the following information to you. Determine which should be kept confidential and why this information should not be revealed to others:
1. Your new raise
2. A new rate schedule to be instituted in two weeks
3. A new owner has bought the company
4. A fellow employee has decided to terminate employment at this company

References

LAP 43-102

Communications in Marketing
Chapter 7

Retailing Principles and Practices
Parts 13, 14, 32
7th Edition, 1981

Introduction to Wholesale Distribution
Chapter 10
Page 142

Cluster Instructional Objective: COMPREHEND THE IMPORTANCE OF COMMUNICATION IN THE UNDERSTANDING OF ORGANIZATIONAL POLICIES

TW-19

2

Communications

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
124-Skill	Role-play the following situation.	LAP 45-124
In interpreting management's policies to employer and employees' problems to management.	Have one student try to explain to a new customer (another student) a company policy. You should provide the policy for the student and allow them a little time to do this.	Communications in Marketing Chapter 8 2nd Edition
Common to Food Marketing	Lecture to the student on the barriers of communications, such as physical, mental and the like.	Merchandising Chapters 5, 9 2nd Edition
		Warehousing--A Guide For Both Users and Operators Chapter 5

Cluster Instructional Objective: ABILITY TO ASSIGN WORK WITH CLARITY

TW-20

Communications 2

What Does the Competent Marketing Employee Do?

109-Knowledge of/or Understanding that

Communications in assigning work means a constant striving for clarity.

Common to
Finance and Credit
Food Marketing

OTHER CLUSTER COMPETENCIES

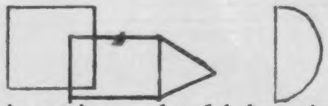
139-Skill

Suggested Learning Activities

Have the students complete the following case problem by determing what items the manager omitted in his communications and how to clarify his communications.

CASE: Mr. Coyne, manager of the transportation department, approached one of his employees with the following:
"Jane, the big wheels upstairs feel that all customer bills should include a self-addressed envelope. I don't think that is necessary, but do what you think should be done. I can't be bothered with silly details like that!"

Play the following game with students. Have one student sit facing the class and another student facing the chalkboard. The student facing the class should describe to the other student how to draw this diagram:



The directions should be simple, and only repeated once. They may not look at one another.

References

LAP 46-109

Introduction to Wholesale Distribution
Chapter 2

Retailing Principles and Practices
Part 53
7th Edition, 1981

Communications in Marketing
Chapters 1, 2

Communications in Marketing
Chapter 1
2nd Edition

Wholesale Management
Chapter 4

Cluster Instructional Objective: ABILITY TO ASSIGN WORK WITH CLARITY

TW-21

2 Communications

What Does the Competent Marketing Employee Do?

139-Skill

Ability to convey directions and instructions clearly to employees.

Common to
General Retail Merchandising
Finance and Credit

OTHER CLUSTER COMEPTENCIES

109-Knowledge of/or Understanding that

Suggested Learning Activities

Have students determine how the following messages could best be communicated to employees:

1. You want a departmental employee to work an additional three hours this coming Saturday night.
2. You need a complete list of all vacation requests for full-time and part-time employees given to your secretary by noon Friday.
3. There will be a cut back in employees in the transportation and warehousing departments.

Have students tape record directions on how to perform a specific task at their training station. Then have students play the tape for other class members to evaluate the directions on the tape for clarity.

References

LAP 46-139

Communications in Marketing
Chapter 5

Fundamentals of Selling
Chapter 15, a, b

Retailing Principles and Practices
Part 53
7th Edition, 1981

Introduction to Wholesale Distribution
Chapter 2

Wholesale Management
Chapter 4

Cluster Instructional Objective: ABILITY TO RELATE THAT FIRST IMPRESSIONS AND ENTHUSIASM ARE POSITIVE WORKER TRAITS

TW-22

What Does the Competent Marketing Employee Do?

158-Attitude

An awareness that nothing is quite so important or contagious as enthusiasm for the company, for the service and for customers.

Common to
- Food Marketing
- General Retail Merchandising
- Finanace and Credit

OTHER CLUSTER COMPETENCIES

163-Attitude

Suggested Learning Activities

Have students brainstorm a list of adjectives or phrases which convey a feeling of enthusiasm. Then the students should identify different ways a worker in transportation and warehousing can show interest towards customers, product and the company. Set up a role playing situation where a customer enters a company to make a purchase. Have a student acting as the salesperson demonstrate enthusiasm in as many different ways as possible.

Have students listen to two tape-recorded sales presentations for the same product. One presentation should be delivered in a monotone and the other delivered enthusiastically. Have students decide from which salesperson to purchase the product. In a group, have students discuss reactions to each salesperson.

References

LAP 55-158

Retail Selling
  Chapter 8

Retailing Principles and Practices
  Part 21

Fundamentals of Selling
  Chapter 3

Basic Selling
  Chapter 9
  2nd Edition

Retailing Principles and Practices
  Parts 13, 63
  7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THAT FIRST IMPRESSIONS AND ENTHUSIASM ARE POSITIVE WORKER TRAITS

What Does the Competent Marketing Employee Do?

163-Attitude

A realization that first impressions are important to the business and last impressions are longest remembered.

Common to
    Food Marketing
    Finance and Credit

OTHER CLUSTER COMPETENCIES

158-Attitude

Suggested Learning Activities

Have three students role-play a situation where they are going in for an interview. Have the first student dress and act poorly; have the second student dress and act a little better; and have the third dress and act the best. Have the class react to the impression each student made.

References

LAP 55-163

Retailing Principles and Practices
    Parts 14, 63

Retailing Principles and Practices
    Part 24
    7th Edition, 1981

Retail Merchandising
    Chapter 3, e
    Chapter 19, d, e

Your Job in Distribution
    Pages 204-205

Warehousing--A Guide For Both Users and Operators
    Chapter 13

Cluster Instructional Objective: ABILITY TO WRITE WITH CLARITY AND ACCURACY

What Does the Competent Marketing Employee Do?

1400-Skill

In writing forms with clarity and accuracy is critical.

Suggested Learning Activities

Obtain purchase orders and shipping orders. Have students fill out forms - grade them on their accuracy and neatness. Use cases from Communications competency 125, page TW-14 in this guide.

Discuss what would result if the forms are not completed accurately.

References

1400

Retail Selling
  Chapter 11
  2nd Edition

Communications in Marketing
  Chapters 1, 7
  2nd Edition

Materials Handling
  Chapter 5

Wholesaling and Physical Distribution
  Chapters 5, 7

Physical Distribution
  Chapters 2, 3

Introduction to Wholesale Distribution
  Chapter 3

Warehousing--A Guide For Both Users and Operators
  Chapter 5

Cluster Instructional Objective: ABILITY TO RELATE GOOD GROOMING TO PRODUCTIVE JOB PERFORMANCE

TW-1

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
263-Knowledge of/or Understanding that How to dress appropriately for the job and maintain a well-groomed appearance. Common to Food Marketing General Retail Merchandising Finance and Credit	Conduct a discussion on grooming and proper dress. Highlight dressing for safety; for example, while at work in a warehouse. Invite a guest speaker, such as a personnel manager, to speak on appropriate dress for work in retail. Have students make two collages of clothing; one will consist of clothing which goes together well and the other will consist of clothing which does not go together. Have students of similar occupational interests get into small groups. The groups can devise a dress code for training stations. Have students view the filmstrip, "The Look Is Natural."	LAP 3-263 Retailing Principles and Practices Parts 8, 9, 63 7th Edition, 1981 Psychology and Human Relations in Marketing Chapter 2 Fundamentals of Selling Chapter 3 Oklahoma Distributive Education I

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF SHOWING AN INTEREST IN OTHERS

TW-2

What Does the Competent Marketing Employee Do?

268-Knowledge of/or Understanding that

How to show an interest in others.

Common to
General Retail Merchandising
Finance and Credit

Suggested Learning Activities

Have students read "How to Win Friends and Influence People." Then students can list on a sheet of paper at least 4 ways one person shows an interest in others. One student should show their list to another student who is doing the same assignment so they can compare lists. Then they should turn in their combined list to you.

Have students keep a notebook for the following situation:

For the next three times when students are informally visiting either friends or fellow workers, they should strive to listen and ask questions instead of doing all the talking. In their notebooks they should record their reaction to the conversation and the feeling created by showing an interest in what the other person was talking about.

References

LAP 7-268

Basic Salesmanship
Chapter 9

Communications in Marketing
Chapter 4

Psychology and Human Relations in Marketing
Page 17

Basic Selling
Chapter 9
2nd Edition

Communications in Marketing
Chapter 4
2nd Edition

Retailing Principles and Practices
Unit 5
7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THAT ENTHUSIASM ON THE JOB CONTRIBUTES TO EMPLOYABILITY

TW-3

What Does the Competent Marketing Employee Do?

303-Skill

In generating enthusiasm toward people.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

Suggested Learning Activities

Discuss with the students different ways in which people can show enthusiasm toward others.

Have students demonstrate how enthusiasm would be shown toward the following types of people:
1) Their boss
2) A fellow employee
3) Best Friend
4) Parents
5) Grandparents

Have students read "How to Win Friends and Influence People." Then students can list at least four ways a person can show enthusiasm with others. One student should show his/her list to another student who is doing the same assignment so they can compare lists. Then they should turn in their combined list to you.

References

LAP 8-303

Fundamentals of Selling
    Chapter 3, c

Retail Selling
    Chapter 8

Retailing Principles and Practices
    Parts 15, 8, 9
    Unit 5
    7th Edition, 1981

Wholesale Management
    Page 33

How to Win Friends and Influence People

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF INITIATIVE AND CREATIVITY TO SUCCESSFUL JOB PERFORMANCE

TW-4

What Does the Competent Marketing Employee Do?

296-Skill

In demonstrating initiative and creativity.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

Suggested Learning Activities

Present a brief lecture on what initiative and creativity is and how it is instrumental in job success and promotion. Follow the lecture with several brief situations (one follows) that could happen at work. Ask the students what they would do in this situation.
SITUATION:
If you saw paper littering the floor in the back stock room, would you pick it up and discard it?
Then ask the students for several situations where they feel that they demonstrated initiative and creativity at work. Ways to lead into this would be to ask students;
1) Were you ever given a task and instead of "just" doing what was required, you took that extra step to do more than what was required of you? How did it make you feel? or 2) Did a customer ever have a special problem where you did something out of the ordinary to help?

Present a brief lecture on the skill of initiative and creativity. Then solicit examples from the students on the types of things they have done at work to demonstrate initiative and creativity. Ask students how it made them feel when they did that "little bit extra."

References

LAP 10-296

Basic Salesmanship
    Chapter 9
    2nd Edition

Psychology and Human Relations in Marketing
    Chapter 2

Retail Merchandising
    Chapter 11

Wholesale Management
    Page 33

Retailing Principles and Practices
    Part 9
    7th Edition, 1981

Retail Selling
    Chapter 7

Fundamentals of Selling
    Chapter 3

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF MAINTAINING AN OBJECTIVE POINT OF VIEW IN BUSINESS RELATIONS

TW-5

What Does the Competent Marketing Employee Do?

284-Skill

In maintaining an objective point of view in problem situations.

Common to
General Retail Merchandising
Food Marketing
Finance and Credit

Suggested Learning Activities

Have students cite one example of a recent problem that developed at work; have them do this in writing. Then the students can determine if the outcome of their problem was approached objectively. They should also explain why or why not and discuss their findings with you.

From selected reading, have students answer the following questions:

1. List at least two advantages of maintaining an objective point of view.
2. Give at least one way to maintain an objective point of view.
3. What is meant by "maintaining an objective point of view?"

References

LAP 12-284

Communications in Marketing
Chapter 2

Retailing Principles and Practices
Part 34
7th Edition, 1981

Cluster Instructional Objective: COMPREHEND THE EFFECT OF MORALE TO JOB PERFORMANCE

TW-6

Human Relations **4**

What Does the Competent Marketing Employee Do?

272-Knowledge of/or Understanding that

Morale as being the term frequently used to describe employee attitudes toward their jobs, employer and fellow employees.

Common to
Food Marketing
Wholesaling

Suggested Learning Activities

Have students prepare a list of benefits offered by their training station which builds morale on the job. Students should list more than just normal "fringe benefits."

Have students write a paper on morale at their training station or a local transportation and warehousing firm. If the student believes the morale is low, they should offer suggestions on how it can be improved. If the student believes the morale is good, they should explain why they think it is that way.

References

LAP 16-272

Fundamentals of Selling
Chapter 15, b

Warehousing--A Guide for Both Users and Operators
Pages 146-150

Communications in Marketing
Chapter 1, 8
2nd Edition

Growing on the Job
Unit I

Communications at Work
Chapter 4

Psychology and Human Relations
Chapter 7

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF BUILDING SOUND WORKING RELATIONSHIPS

TW-7

What Does the Competent Marketing Employee Do?

269-Knowledge of/or Understanding that

How to build sound working relationships in "forced" associations.

Common to
Food Marketing
Finance and Credit

Suggested Learning Activities

Have a case problem dealing with "forced" associations. Have students get into small groups. Using the five-step problem solving method approach, the group can prepare a presentation for the class acting out the case problem and their solution.

Have two or three students cite personal examples of forced relationships at work that are either good or not good. Then the rest of the class can problem-solve a solution about the "forced associations." Discuss with the class their results.

References

LAP 19-269

Retailing Principles and Practices
  Part 13, 12
  7th Edition, 1981

Basic Selling
  Chapter 9

Human Relations in Marketing
  Chapter 1, 2
  2nd Edition

Communications in Marketing
  Chapter 3
  2nd Edition

Wholesale Management
  Page 35

Basic Salesmanship
  Chapter 9

Fundamentals of Selling
  Chapter 3

Cluster Instructional Objective: ABILITY TO ADAPT TO THE PERSONALITY AND NEEDS OF THE CUSTOMERS

What Does the Competent Marketing Employee Do?

288-Skill

In adapting to the personality and needs of customers.

Common to
  Food Marketing
  Finance and Credit

Suggested Learning Activities

Select two or three students for a role playing situation. Have each student adopt a role of either 1) an indecisive buyer, 2) an aggressive know-it-all buyer, or 3) a buyer who is in a terrible hurry. Role play three short situations where you are the clerk. Demonstrate to the students the skill in adapting to the personality and needs of the customer.

Have students explain incidents at work where they had to modify their behavior in dealing with customer personalities. Discuss with the students how the case was handled and what could have been done to improve the situation-keeping in mind the personality and the needs of the customer. From this discussion, have students develop a list of "how to do it" for the students use at their training station.

References

LAP 20-288

Marketing and Distribution
  Chapters 7, 8

Retail Merchandising
  Chapter 11, c, d

Fundamentals of Selling
  Chapters 4, 9, 10, 12
  Part e

Basic Selling
  Chapter 3
  2nd Edition

Psychology and Human Relations in Marketing
  Chapter 2
  2nd Edition

Retailing Principles and Practices
  Unit 14
  7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF INTERDEPENDENT RELATIONSHIPS

TW-9

What Does the Competent Marketing Employee Do?

276-Knowledge of/or Understanding that

Human relations in business organizations consist of an interdependence with fellow employees, supervisors and customers.

Suggested Learning Activities

Take a situation where employee-employee relations, employee-employer relations, and employee-customer relations are involved (i.e., the school concession stand). Have the students break into three groups; each group representing one of the elements. Then have each group develop a list of items they consider to be their "rights." After a short time, have a representative from each group write their list on the overhead or blackboard. Give students time to note the differences; then discuss the differences with the students and whether or not the differences would affect the successful operation of the business. While working on this activity, always keep in mind the interdependence of the three elements (groups).

Discuss or lecture on the following topic: "How does each of the elements of interdependence with fellow employee, supervisor, and customer affect the overall success of a business operation?"

References

LAP 23-276

Human Relations in Marketing
Chapter 4
2nd Edition

Introduction to Wholesale Distribution
Chapter 2

Retailing Principles and Practices
Unit 11
7th Edition, 1981

Fundamentals of Selling
Chapter 7, e

Cluster Instructional Objective: ABILITY TO RECOGNIZE HOW TO HANDLE DIFFICULT CUSTOMERS

Human Relations

4

What Does the Competent Marketing Employee Do?

280-Knowledge of/or Understanding
that

The ways to effectively handle difficult customers.

Common to
Food Marketing
Finance and Credit

Suggested Learning Activities

In a group, have students relate how they have handled difficult customers at work. The group should explore each situation to see why the approach worked. If it is a situation that did not work, the group can come up with a hypothetical solution.

Role play a situation where you or another student is a difficult customer and a student is the employee. The employee-student should not know what the problem will be until the role playing begins. The class should observe the role play taking notes on what the employee-student did right and what could have been done to increase the possibility of customer satisfaction.

Lecture to the class on effective ways to handle difficult customers. After the lecture, have another instructor role play with you several short situations which go through various types of customer complaints. Have students react to what was done right and what was done wrong in the way the employee handled the situation.

References

LAP 28-280

Retailing Principles and Practices
Unit 14
7th Edition, 1981

Warehousing--A Guide For Both Users and Operators
Pages 53-54

Retail Merchandising
Chapter 11

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF REPRESENTING THE BUSINESS FAVORABLY

TW-11

4

Human Relations

What Does the Competent Marketing Employee Do?

287-Skill

In representing the business favorably to customers and outside business associates.

Common to
    Finance and Credit
    Food Marketing
    General Retail Merchandising

Suggested Learning Activities

Have students make a list of all the positive characteristics of their job and of the training station.

SITUATION: A friend has heard that a student's training station is a terrible place to work.

Through a role playing situation, have the student convince the friend that the training station is actually a good place to work.

In buzz groups, have students create a list of items that project a bad image of a business to customers. Students can compare their lists and provide solutions to the various problems.

References

LAP 30-287

Retail Selling
    Chapter 7

Fundamentals of Selling
    Chapter 3, c

Retailing Principles and Practices
    Parts 34, 63
    7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF BUILDING GOOD PUBLIC RELATIONS

TW-12

4 Human Relations

What Does the Competent Marketing Employee Do?

320-Attitude

A feeling that good human relations improves employee morale by encouraging cooperation, generating happiness, and creating harmony.

Common to
    General Retail Merchandising
    Finance and Credit

Suggested Learning Activities

Ask students to obtain examples of what their training station or a local transportation and warehousing firm does in order to promote better public relations.

Have students set up a public relations calendar for their training station.

Ask students the following questions and have them respond in written form. Ask students to answer within the confines of the transportation and warehousing industry. You could also ask them if the type of industry makes a difference. Write comments when evaluating students' responses.

1. What is the meaning of public relations?
2. Why do firms employ public relations personnel?
3. How are good public relations developed?

References

LAP 31-320

Psychology and Human Relations in Marketing
    Chapter 5
    2nd Edition

Retailing Principles and Practices
    Part 14
    7th Edition, 1981

Wholesale Management
    Assignment 8

Wholesaling and Physical Distribution
    Chapter 4

University of Arizona Curriculum Guide
    Advertising Section

Cluster Instructional Objective: UNDERSTAND FACTORS THAT AFFECT EMPLOYEE MORALE

TW-13

What Does the Competent Marketing Employee Do?

262-Knowledge of/or Understanding that

The factors which appear to affect employee morale.

Common to
Food Marketing

Suggested Learning Activities

Divide the class into two groups. Have one half develop a list of factors that help to increase morale at their training station or a local firm in the community. The other half can develop a list which hurts morale. Compare the lists and determine how the positive items can be increased and the negative removed.

Provide examples of policies in two different transportation and warehousing firms that would affect employee's morale. Ask the students to explain in writing how the policies would affect morale. The class can discuss their answers in a group.

The BETA Shipping Co. has developed the following policies for their operation:

1. Women are not allowed to work in areas of the company where "heavy equipment" is used.
2. Supervisors will be hired from other cities rather than from inside the firm. This will provide a constant flow of new ideas into the firm.
3. There will be a $100 reward for any employee who catches another employee stealing.

How will these policies affect employee morale?

References

LAP 33-262

Retailing Principles and Practices
Units 5, 11, 17
7th Edition, 1981

Psychology and Human Relations in Marketing
Chapter 7

Warehousing--A Guide For Both Users and Operators
Pages 146-150

Cluster Instructional Objective: IDENTIFY THE EFFECTS OF POOR STORE MORALE TO JOB SATISFACTION

Human Relations 4

What Does the Competent Marketing Employee Do?

271-Knowledge of/or Understanding that

The evidences of poor morale-high personnel turnover, numerous grievances, increased absenteeism and tardiness and restriction of output and tardiness.

Common to
Food Marketing

Suggested Learning Activities

Have students identify one employee at work who they think has a "morale" problem, identify the characteristics which they believe lead to this conclusion. Working from the list, the students should prescribe the action they would take as this employee's manager to try and improve the employee's morale. The students should discuss their findings with you.

Have students of similar career interests get into small groups. From selected readings, have students answer the following questions:

1. What is a "job skipper?" Why do people frequently change jobs?
2. What can be done to avoid becoming a "job skipper?"
3. What do you think of employees who are always complaining about their job, fellow employees, or the boss? Is it right to do this at work--why or why not?

Have students read and solve an assigned case from "Your Attitude is Showing."

References

LAP 34-271

Psychology and Human Relations in Marketing
Chapter 4

Human Relations in Business
Chapter 13

Growing on the Job
Unit II

Human Relations in Marketing
Chapter 4
2nd Edition

Warehousing--A Guide For Both Users and Operators
Pages 146-150

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF COMMUNICATION AND MOTIVATION TO EFFECTIVE HUMAN RELATIONS

TW-15

What Does the Competent Marketing Employee Do?

331-Attitude

An awareness that motivation is closely connected with communication.

Common to
    Food Marketing
    Wholesaling
    Finance and Credit

Suggested Learning Activities

Acquire three employee memoranda; one should talk down to the employee, another should patronize him, and third should show him respect as being part of the organization. Make a transparency of each.

Have students try to pick out the "feeling" of each memorandum. Then discuss motivation and communication with the students.

Discuss how the following items are motivation techniques:

1. Communication of achievement recognition.
2. Company newsletter which includes articles on the employees.
3. Training manuals.
4. A system of evaluating work progress.

Have the student explain how this type of communication is motivational and what type of motivational communication is used where they work.

References

LAP 35-331

Human Relations in Business
  Chapter 8

Communications in Marketing
  Chapters 1, 7

Retailing Principles and Practices
  Parts 14, 13, 52
  7th Edition, 1981

Human Relations in Marketing
  Chapters 4, 6
  2nd Edition

Communications at Work
  Chapters 1, 3, 4

Wholesale Management
  Assignment 5

Warehousing--A Guide For Both Users and Operators
  Chapter 5

Cluster Instructional Objective: IDENTIFY THE EFFECTS OF EMPLOYEE MORALE AS INFLUENCED BY SUPERVISORS

9 What Does the Competent Marketing Employee Do?

328-Attitude

A realization that employee morale is influenced by the supervisor's attitude.

Common to
Food Marketing
Finance and Credit

Suggested Learning Activities

Have students define "morale" and "morale problem." Then have them compare their definition with others. After this, the students can list factors that lead to good employee morale. Then the students can rank the factors and compare themselves to the list on a scale from one to ten. Then they can use the exercise for personal improvement.

Have students define "morale" and "morale problem." Go over their definitions with the students and then have them list in two columns why they don't like to work for a supervisor and why they like to work for another. Ask them how they can maintain a good situation and what they could do to improve a poor situation.

Have students work by themselves or in small groups. Use a case problem dealing with morale and have students use the five-step case problem solving method. Discuss the responses individually with each student.

References

LAP 36-328

Psychology and Human Relations in Marketing
Chapters 5, 6, 7

Human Relations in Business
Chapters 3, 4

Human Relations in Marketing
Chapters 5, 6, 7
2nd Edition

Retailing Principles and Practices
Parts 52, 53
7th Edition, 1981

Wholesale Management
Assignment 5

Cluster Instructional Objective: KNOWLEDGE OF TECHNIQUES USED FOR BUILDING EMPLOYEE MORALE

TW-17

What Does the Competent Marketing Employee Do?

264-Knowledge of/or Understanding that

How to build morale in employees.

Suggested Learning Activities

In a class discussion, discuss the basic needs of employees i.e., physical, safety, social, esteem, self-actualization. List needs on the board. After the list is complete, have the students explain how satisfying these needs will build morale.

Have the students write a report to be given to the class on what activities are done at their training station or a local transportation and warehousing firm to build morale.

References

LAP 38-264

Retailing Principles and Practices
Units 5, 11, 7
7th Edition, 1981

Psychology and Human Relations in Marketing
Chapter 7

Communications in Marketing
Chapters 1, 8
2nd Edition

Fundamentals of Selling
Chapter 15, b

Warehousing--A Guide For Both Users and Operators
Pages 146-150

Cluster Instructional Objective: IDENTIFY THE EFFECT OF EMPLOYEE PARTICIPATION IN POLICY DEVELOPMENT

TW-18

4 Human Relations

What Does the Competent Marketing Employee Do?

277-Knowledge of/or Understanding that

Personnel usually understand and comply more readily with policies and procedures which they helped develop.

Common to
General Retail Merchandising

Suggested Learning Activities

Have students determine how policies are formed at their training station or in a local transportation and warehousing business. They should answer the following questions as well as elaborate on any other information they feel is important. "Is there opportunity for input at the local level? How?" "Is there a set procedure?" "Does policy procedure come down from the corporate level?" Their answers should be submitted to you.

Have students write a reaction paper to the topic "Personnel Usually Understand and Comply More Readily with Policies and Procedures They Have Helped Develop." The report should be only one page in length and submitted to their training supervisor for comments. Then the training supervisor's comments should be written in a separate report and both reports submitted to you.

References

LAP 42-277

Psychology and Human Relations in Marketing
Chapter 7

Communications in Marketing
Chapter 1

Retail Merchandising
Chapter 5, e

Retailing Principles and Practices
Parts 13, 32
7th Edition, 1981

Fundamentals of Selling
Pages 487-489

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF COMPLYING WITH POLICIES AND PROCEDURES

TW-19

4 Human Relations

What Does the Competent Marketing Employee Do?

325-Attitude

A willingness to accept and put into practice the planned policies and procedures of management.

Common to
    Finance and Credit
    Food Marketing
    Wholesaling

Suggested Learning Activities

Have the students complete a personality rating sheet. Discuss how personality factors affect human relations. Have students give examples of adjustments they think should be made in fellow employees.

References

LAP 44-325

Retail Selling
    Chapter 7

Fundamentals of Selling
    Chapter 3

Human Relations in Business
    Chapter 1

Oklahoma Distributive
Education I

Retailing Principles and
Practices
    Part 32
    7th Edition, 1981

Cluster Instructional Objective: ATTITUDE THAT GOOD HUMAN RELATIONS DEPENDS ON THE PERSONALITY FACTORS

TW-20

4 Human Relations

What Does the Competent Marketing Employee Do?

326-Attitude

An awareness that good human relations depends on the personality factor and the adjustment of personalities.

Common to
Finance and Credit

Suggested Learning Activities

Have the students complete a personality rating sheet. Discuss how personality factors affect human relations. Have students give examples of adjustments they think should be made in fellow employees.

References

LAP 45-326

Retail Selling
Chapter 7

Fundamentals of Selling
Chapter 3

Human Relations in Business
Chapter 1

Oklahoma Distributive
Education I

Retailing Principles and
Practices
Part 14
7th Edition, 1981

Cluster Instructional Objective: UNDERSTAND THAT HUMAN RELATIONS IS IMPORTANT TO EMPLOYEE PRODUCTIVITY

What Does the Competent Marketing Employee Do?

322-Attitude

An awareness that good human relations help increase production by stimulating interest and creativeness in employees.

Common to
    Food Marketing
    Wholesaling
    Finance and Credit

Suggested Learning Activities

Have students describe a group situation they have experienced where there was poor human relations. Students can describe the effect this situation had on the interest, participation, and contributions made by the group. The same can be done for a good experience in human relations.

Ask a teacher from the social science department who specializes in World War II to speak to the class on how the American People united during the time of war to increase production and to produce at a fantastic rate. Discuss with the class the causes of such an effort and whether or not human relations entered into the situation.

Set up a case problem where students are in charge of a shipping and receiveing department or stockroom. Explain to the students that the backroom is not air conditioned and during the summer months there is quite a bit of sickness and absenteeism. Ask students how they would solve the problem of employee morale.

References

LAP 46-322

Psychology and Human Relations in Marketing
    Chapter 1

Human Relations in Marketing
    Chapter 1
    2nd Edition

Retailing Principles and Practices
    Parts 14, 52
    7th Edition, 1981

Cluster Instructional Objective: DEMONSTRATE THE IMPORTANCE OF WORKING TOWARD MUTUALLY BENEFICIAL OBJECTIVES

What Does the Competent Marketing Employee Do?

273-Knowledge of/or Understanding
    that

Supervisors or managers accomplish results by encouraging employees to work toward mutually beneficial objectives.

Common to
    Food Marketing
    Finance and Credit

Suggested Learning Activities

Have students in small groups interview a transportation and warehousing firm to determine objectives of the company. The students should also ask how the supervisors and managers encourage employees to work toward these objectives. In class, compare results and discuss why everyone should all work toward the common goal.

References

LAP 49-273

Human Relations in Marketing
    Chapter 4
    2nd Edition

Retailing Principles and Practices
    Parts 33, 52, 53
    7th Edition, 1981

Starting Your Own Marketing Business
    Chapter 7
    2nd Edition

Introduction to Wholesale Distribution
    Chapter 2

Cluster Instructional Objective: DEMONSTRATE HOW TO MOTIVATE OTHERS TW-23

What Does the Competent Marketing Employee Do?

270-Knowledge of/or Understanding that

How to motivate others for best performance.

Common to
Food Marketing

Suggested Learning Activities

Have students discuss the relationship between employee motivation and employee perceptions toward work. Students can give examples from personal experiences to illustrate this relationship.

Have students brainstorm on how employers try to motivate employees to work better. Students should develop a list of at least ten ways employers develop motivation.

References

LAP 50-270

Fundamentals of Selling
Chapter 15

Retailing Principles and Practices
Part 52
7th Edition, 1981

Wholesale Management
Page 32

Cluster Instructional Objective: COMPREHEND THAT ACHIEVING RESULTS THROUGH OTHERS IS A FUNCTION OF GOOD SUPERVISION

What Does the Competent Marketing Employee Do?

315-Attitude

A feeling that the effective supervisor must be a leader whose job is to achieve results through other people.

Common to
Food Marketing
Finance and Credit

Suggested Learning Activities

From a personal experience either at work or in a personal relationship, have students list the characteristics they like in a leader or supervisor. Students should discuss how these characteristics allow people to achieve results in whatever they are doing. The student's findings should be discussed with you.

In small group discussions, have the students evaluate the following situation:

John Kelley, the transportation department manager has the philosophy that it is his future first, the company second, and the employee third. He has a reputation for firing people who don't do exactly what he tells them to do. What's wrong with this philosophy.

In small groups, have students discuss the topic, "One Way to Achieve Successful Results is Working With and Through People." Have the group list the key points of the discussion and turn the report in to you.

References

LAP 52-315

Psychology and Human Relations in Marketing
Chapter 7

Human Relations in Business
Chapter 6

Retailing Principles and Practices
Parts 32, 52
7th Edition, 1981

Human Relations in Marketing
Chapters 4, 7
2nd Edition

Wholesale Management
Assignment 5

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF SELECTING GOOD NEW EMPLOYEES

TW-25

What Does the Competent Marketing Employee Do?

290-Skill

In selecting the right person to do a job, giving clear instructions and seeing that instructions are properly carried out.

Common to
    General Retail Merchandising
    Food Marketing

Suggested Learning Activities

From selected reading, have students determine just what a supervisor's responsibilities are. After completing the list, students can check the results with the supervisor at their training station or a local transportation and warehousing company. Students should make additions and draw a line through deletions so the original list reflects these changes. Their results should be turned to you.

Have students determine what criteria is used in hiring new employees at their training stations. Then students should try to imagine themselves in charge of hiring new employees and identify what they would expect of a new employee and why. Students could either discuss the results with you or role play the situation.

References

LAP 55-290

Retailing Principles and Practices
    Part 56, 57

Psychology and Human Relations in Marketing

Human Relation in Business
    Chapter 6

Retailing Principles and Practices
    Parts 52, 53
    7th Edition, 1981

Warehousing-- A Guide for Both Users and Operators
    Chapter 13

Industrial Traffic Management
    Chapter 14

Cluster Instructional Objective: COMPREHEND THAT SUPERVISORY TRAINING INCREASES UNDERSTANDING

TW-26

Human Relations 4

What Does the Competent Marketing Employee Do?

330-Attitude

A recognition that training contributes to the understanding by supervisors of personnel management and other managerial functions which they must perform.

Common to
    Food Marketing
    Wholesaling

Suggested Learning Activities

Have students interview either a local manager or their training supervisor to find out what type of management training programs the company has for potential managers as well as upgrading present managers. Have students make a brief report and turn it in to you.

From selected readings, have students identify the four major functions of a manager. The students should be sure to react to the following questions: "At the first supervisory level, what do you think is the most important function of managers? Why?" "What type of programs or activities should the company offer to managers or potential managers in helping them improve their skills?" Their responses should be turned in to you.

Have students identify the four major functions of a manager. For each function, have students list two skills necessary in order to perform the function. Of the four functions, have students identify what they consider to be the most important for the first supervisory level and why.

References

LAP 56-330

Retailing Principles and Practices
    Part 57

Growing on the Job
    Unit 1

Industrial Traffic Management
    Chapter 14

Supervisory Skills in Marketing
    Chapters 1, 5

Warehousing--A Guide For Both Users and Operators
    Page 145

Human Relations 4

Cluster Instructional Objective: DEMONSTRATE THE ABILITY TO RELATE THE VALUE OF HELPING NEW EMPLOYEES

TW-27

What Does the Competent Marketing Employee Do?

275-Knowledge of/or Understanding
that

The supervisor must help new employees adjust to their jobs, seeing that they are trained for the job and that they become acquainted with fellow employees.

Common to
Food Marketing
General Retail Merchandising

Suggested Learning Activities

Have students interview a supervisor at a transportation and warehousing firm to find out how new employees are helped in adjusting to their jobs, and what method is employed to acquaint new employees with other employees with whom they will be working.

Have students assume they are the supervisor in charge of training new employees. The students can compile a list of responsibilities they feel a supervisor should handle when training new employees and seeing that the new employees become acquainted with fellow employees.

Have students write to three transportation and warehousing firms (such as National Can Corporation, Spector Freight, Milwaukee Railroad) to find out the kind of training program each provides for new employees.

References

LAP 57-275

Retailing Principles and Practices
Parts 52, 53
7th Edition, 1981

Business in Marketing
Chapters 3, 4

Growing on the Job
Unit I

Warehousing--A Guide For Both Users and Operators
Pages 143-145

Wholesale Management
Pages 35, 111

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF RECOGNIZING EMPLOYEE ACCOMPLISHMENTS

What Does the Competent Marketing Employee Do?

265-Knowledge of/or Understanding that

How to recognize the accomplishment of others.

Common to
Food Marketing

Suggested Learning Activities

Have students secure several copies of the school newspaper and identify 10 articles that illustrate individuals being recognized for some type of accomplishment. Then students can select two of these individuals and interview them on how it felt to be recognized in the school paper. The two people interviewed should be ones that have different backgrounds. The students should summarize the interview and turn it in to you.

Have students form into small groups and brainstorm on "how can you, as students, recognize the accomplishments of others either at school or at work." The group should compile a list of ideas, review the list to identify which ones would really work, and then discuss the final list with you explaining the merits of each idea.

Have students identify how their employer or training sponsor recognizes the student's accomplishments. Also, have the student explain what type of feeling is created when recognition is received. If their employer or training sponsor doesn't recognize accomplishments of others, have students explain what kind of atmosphere this creates.

References

LAP 63-265

Psychology and Human Relations in Marketing
Chapter 6

Retailing Principles and Practices
Parts 34, 52, 53
7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF UTILIZING EMPLOYEE'S IDEAS

TW-29

2

4

Human Relations

What Does the Competent Marketing Employee Do?

327-Attitude

A realization that employee's ideas often prove beneficial when incorporated into business operations.

Common to
Food Marketing

Suggested Learning Activities

Illustrate to the students examples of different types of employee suggestion systems and some examples of the success and/or failures of these systems. Explain to the students why a suggestion system cannot be used as a token gesture. Have students react and explain the system where they work.

Have students find out what type of employee suggestion system is in operation at their training station. Have them prepare a short report either oral or wirtten, explaining the system.

In small groups, have students decide why or why not a supervisor should accept and use the ideas of employees.

References

LAP 64-327

Psychology and Human Relations in Marketing
Chapters 7, 8

Retailing Principles and Practices
Part 32, 52
7th Edition, 1981

Human Relations in Marketing
Chapters 7, 8
2nd Edition

Human Relations in Business
Chapters 3, 4

Cluster Instructional Objective: RELATE THE NEED FOR TRAINING ASSISTANT MANAGERS

What Does the Competent Marketing Employee Do?

332-Attitude

That time spent training management trainees is worthwhile to the future of the business.

Common to
Food Marketing

Suggested Learning Activities

Have students visit with their training sponsor or with the local transportation and warehousing manager to see what type of activities are available at work for training assistant managers. The students should also find out how assistant managers are selected and what type of training program a new manager would have to go through.

Have students write a short report on why or why not they think the time spent training assistant managers is a valuable investment. Have students discuss the paper with you.

Break students into small groups with other students of similar career interests. The group can discuss the various management training programs the training stations offer. The group should also decide whether or not such a training program is a worthwhile venture to the future of the business.

In small groups have students design a training plan for assistant transportation managers.

References

LAP 86-332

Psychology and Human Relations in Marketing
Chapter 7

Human Relations in Business
Chapter 4

Human Relations in Marketing
Chapter 7
2nd Edition

Retailing Principles and Practices
Part 53, 54
7th Edition, 1981

Cluster Instructional Objective: ABILITY TO TREAT OTHERS AS INDIVIDUALS

Human Relations 4

What Does the Competent Marketing Employee Do?

1500-Skill

In treating others as individuals.

1507-Skill

Treat customers as individuals, get to know them.

Suggested Learning Activities

Have the students get into small groups and role play the following situations:

SITUATION:
As the manager of the Transportation and Warehousing Department, the following people are assigned to you as trainees. How would you treat each as an individual?

1. John Green, 23, no work experience in transportation and warehousing, but has a college degree.
2. Sara Collins, 35, married, two children, worked for another transportation and warehousing firm for five years.
3. Betty Jones, 18, very aggressive, former D.E. student, worked in a transportation and warehousing firm for Co-op.
4. Bill Johnson, 45, no work experience in transportation and warehousing, has a lot of experience in various positions, has a habit of changing jobs frequently.

It is your responsibility to treat employees with respect and introduce them to their jobs. Role play this situation.

References

1500 - 1507

Fundamentals of Selling
Chapter 5

Human Relations in Business
Chapters 1, 2
2nd Edition

Retailing Principles and Practices
Part 21

Warehousing: A Guide For Both Users and Operators
Chapter 5

Retailing Principles and Practices
Parts 15, 34
7th Edition, 1981

Cluster Instructional Objective: ABILITY TO TREAT OTHERS AS INDIVIDUALS

What Does the Competent Marketing Employee Do?

1507-Skill (Continued)

Treat customers as individuals, get to know them.

Suggested Learning Activities

Mr. Mark Stevens, Vice President, Manchester's.
Their needs are to store merchandise.

Mr. Smith, Owner, Smith & Son.
Manufactures car parts to be shipped to dealers.

Ms. Helen O'Connor, Traffic Manager, Phillips Corporation.
They manufacture furniture and need it shipped.

Have another student play the customer. Develop a list of questions and get to know your customer better.

References

1507

Human Relations in Marketing
  Chapters 1, 5

Retail Merchandising
  Chapter 6, a

Human Relations in Business
  Chapters 1, 4
  2nd Edition

Retail Selling
  Chapter 18
  2nd Edition

Retailing Principles and Practices
  Part 21

Retailing Principles and Practices
  Parts 14, 42
  7th Edition, 1981

Cluster Instructional Objective: ABILITY TO WORK WITH SUPPLIERS, ADVERTISERS AND COMMUNITY REPRESENTATIVES

TW-33

What Does the Competent Marketing Employee Do?

1501-Skill

In working cooperatively with other persons outside the firm such as suppliers, advertisers, and community representatives.

Suggested Learning Activities

In small groups have students role play. The students should set up a mock transportation and warehousing company. Then have the students discuss and analyze how they would handle the following situations:

1. Obtaining supplies. Building a rapport with the suppliers.
2. Determining advertising needs and obtaining an advertising agency.
3. Developing a rapport with the community.

Have students develop a plan for each item listed above. Role-play the situation if possible.

References

1501

Retailing Principles
and Practices
Parts 20, 21

Retailing Principles
and Practices
Parts 14, 34
7th Edition, 1981

Human Relations in
Business
Chapter 1
2nd Edition

Human Relations in
Marketing
Chapters 3, 4
2nd Edition

Cluster Instructional Objective: ABILITY TO USE INITIATIVE IN DEALING WITH CUSTOMERS, MANAGERS AND FELLOW EMPLOYEES

What Does the Competent Marketing Employee Do?

1502-Skill

In demonstrating initiative in dealing with customers, other employees and manager.

Suggested Learning Activities

Begin with a discussion of what initiative is. After the discussion, ask the students to take 10 minutes to develop a list of how they show initiative at work. Students should share their list with the class.

In small groups, have students take turns role-playing situations demonstrating their initiative.

Example: One student (employee 1), another student (employee 2) --

Employee 1 is loaded with work, employee 2 would do what to help?

Set up situations of this nature allowing students to react showing initiative.

References

1502

Human Relations in Business
Chapter 13

Your Attitude is Showing
Chapters 3, 17

Fundamentals of Selling
Chapters 3, 5

Personality Development for Business
Chapters 7, 9

Warehousing -- A Guide for Both Users and Operators
Chapter 13

Cluster Instructional Objective: SKILL IN BEING A LEADER USING THE APPROPRIATE STYLE

What Does the Competent Marketing Employee Do?

1503-Skill

In serving customers courteously and represent the firm favorably.

Suggested Learning Activities

In small groups have students complete the following case:

You have just been assigned the task of distributing the work load among the transportation clerks. What leadership style would you use and how would you complete this task?

OR

As a transportation clerk, your boss has asked your help in solving this problem. The problem is that the clerks are slow in processing rates which is costing the company money.

Lecture on leadership styles. Use the Human Relations Handbook and have students determine what type of leader they are.

References

1503

Human Relations in Marketing
  Chapters 6, 7
  (2nd Edition)

Retailing Principles and Practices
  Parts 14, 34, 63
  7th Edition, 1981

Introduction to Wholesale Distribution
  Chapter 2

Your Job in Distribution
  Pages 297-298

Transportation for Marketing and Business Students
  Page 49

Warehousing - A Guide for Both Users and Operators
  Chapter 13

4 Human Relations

Cluster Instructional Objective: ABILITY TO ESTABLISH AND MAINTAIN CREDIBILITY

TW-36

What Does the Competent Marketing Employee Do?

1504-Skill

In establishing and maintaining credibility with customers, co-workers, employees and managers.

Suggested Learning Activities

Discuss with the class what credibility is. Have the students give examples on how they can establish credibility at work.

In a role-play situation, have students demonstrate how they would build credibility with fellow employees, customers and managers. Assign one of the sources for the students to read. After their reading is completed, have them in small groups to discuss how to build credibility.

References

1504

Human Relations in Business
    Chapters 1, 6
    2nd Edition

Retailing Principles and Practices
    Part 21

Retailing Principles and Practices
    Parts 14, 34, 63
    7th Edition, 1981

Human Relations in Marketing
    Chapters 7, 8
    2nd Edition

Warehousing--A Guide For Both Users and Operators
    Chapter 13

Wholesaling and Physical Distribution

Cluster Instructional Objective: ABILITY TO ADJUST TO DEMANDS ON THE JOB

TW-37

Human Relations 4

What Does the Competent Marketing Employee Do?

1505-Skill

In adjusting to the demands of job requirements, such as deadlines, pressures, and conflicts.

Suggested Learning Activities

In small groups, have students discuss the following events:

1. Rush orders
2. Overtime
3. Working on weekends
4. Course work to advance on the job
5. Strikes
6. Evaluations

What effect will these events have on their job?

References

1505

Retailing Principles and Practices
Part 21

Retailing Principles and Practices
Parts 14, 34
7th Edition, 1981

Human Relations in Marketing
Chapters 3, 4

Human Relations in Business
Chapter 1
2nd Edition

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: ABILITY TO WORK WITH PEOPLE INTERNALLY AND EXTERNALLY (OVER THE PHONE)

What Does the Competent Marketing Employee Do?

1506-Skill

Deal with people both internally and externally (over the phone).

Suggested Learning Activities

Discuss teamwork while at work and phone techniques. In a role-play situation, have students demonstrate good human relations.

Examples:

1. A customer enters the office upset and in a hurry. Have a student demonstrate how to approach this.
2. A customer calls and cancels a large deal about $15,000. How would the student handle this situation without becoming upset.

References

1506-Skill

Retail Selling
  Units 4, 5
  2nd Edition

Retail Merchandising
  Chapter 12, c

Human Relations in Business
  Chapter 1
  2nd Edition

Human Relations in Marketing
  Chapter 1
  2nd Edition

Retailing Principles and Practices
  Parts 21, 45

Introduction to Wholesale Distribution
  Chapter 18

Cluster Instructional Objective: ATTITUDE THAT GOOD WORK HABITS ARE IMPORTANT

TW-39

What Does the Competent Marketing Employee Do?

1508-Attitude

That good work habits, such as punctuality, orderliness, and patience are important when working for a company.

Suggested Learning Activities

Have the students brainstorm what they think are important work habits. Upon completion, add anything that they miss and discuss the importance of each.

In small groups have students develop a survey to interview transportation and warehousing employees on what they believe are good work habits. The students should tabulate the results and use them as a basis for decisions. Conclude the activity with a short paper on their personal beliefs in regard to good habits.

References

1508

Retail Selling
   Chapter 6
   2nd Edition

Retailing Principles and Practices
   Parts 4, 20, 21

Retailing Principles and Practices
   Parts 14, 34
   7th Edition, 1981

Human Relations in Business
   Chapter 1
   2nd Edition

Human Relations in Marketing
   Chapters 3, 4
   2nd Edition

Cluster Instructional Objective: RELATE HOW ETHICS ARE IMPORTANT TO A PERSON'S JOB

TW-40

What Does the Competent Marketing Employee Do?

1509-Attitude

That appropriate ethics such as integrity and honesty are important when working for a company.

Suggested Learning Activities

Begin with a discussion on work ethics. Either in a small group or a brainstorming session have students develop a list of necessary work ethics. Add to this list if necessary.

Have the students interview a transportation and warehousing manager on the importance of work ethics. The students should submit a paper to you for evaluation.

References

1509

Retail Selling
  Chapter 6

Retailing Principles and Practices
  Parts 4, 15, 20, 21

Retailing Principles and Practices
  Parts 14, 32
  7th Edition, 1981

Human Relations in Business
  Chapter 1
  2nd Edition

Human Relations in Marketing
  Chapters 3, 4
  2nd Edition

Cluster Instructional Objective: DEMONSTRATE WHY A POSITIVE ATTITUDE MUST BE MAINTAINED

TW-41

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1510-Attitude	Lecture on what is meant by the word attitude. Ask students how they show a positive attitude toward responsibilities.	1510
That a positive attitude must be maintained toward individual responsibilities and/or department and company operations.	This paper should include the student's opinions on what they believe are positive attitudes and also how one shows a positive attitude.	Retail Selling Chapter 6 Retailing Principles and Practices Parts 4, 20, 21 Retailing Principles and Practices Parts 32, 34 7th Edition, 1981 Human Relations in Business Chapter 1 2nd Edition Human Relations in Marketing Chapters 3, 4 2nd Edition

Cluster Instructional Objective: ATTITUDE THAT ONE MUST ASSUME RESPONSIBILITY FOR HIS/HER ACTIONS

TW-42

What Does the Competent Marketing Employee Do?

1511-Attitude

That one must assume responsibility for individual actions and/or department and company operations.

Suggested Learning Activities

Discuss in small or large groups:

1. What the student does if they are late to work.
2. What the student would do if they lost a large account of the company.
3. How the student would handle the information that their boss was taking another job.

References

1511

Retail Selling
  Chapter 6

Retailing Principles and Practices
  Parts 4, 20, 21

Retailing Principles and Practices
  Parts 14, 32
  7th Edition, 1981

Human Relations in Business
  Chapter 1
  2nd Edition

Human Relations in Marketing
  Chapters 3, 4
  2nd Edition

Cluster Instructional Objective: DEMONSTRATE THAT DEPENDABILITY IS NECESSARY IN THE WORK ENVIRONMENT TW-43

4

Human Relations

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1512-Attitude That one must be dependable in the work environment.	Assign one of the references for students to read. Upon completion, have students develop a survey on important traits to possess for work. Have them administer the survey at transportation and warehousing firms. After tabulating the results, ask the students to report the findings to the class. Follow with a discussion on being dependable. In small groups have students debate the statement, "Dependability is a necessary trait for a good worker to possess."	1512 Retailing Principles and Practices Parts 20, 21 Retailing Principles and Practices Parts 14, 34 7th Edition, 1981 Human Relations in Business Chapter 1 2nd Edition Human Relations in Marketing Chapters 3, 4 2nd Edition

Cluster Instructional Objective: ACQUIRE AN AWARENESS OF THE IMPORTANCE OF MOTIVATION TECHNIQUES WHEN DEALING WITH CUSTOMERS

TW-44

Human Relations 4

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1513-Attitude That motivation is important especially when dealing with customers by voice only.	Have students role-play the following situation: Have one student act as the customer on the phone and a second student as the transportation and warehousing clerk. Have the transportation and warehousing clerk be unpleasant, talk softly etc., to make the customer get a negative attitude and not buy. In the second situation, have the same or two different students do the same thing; only this time the transportation and warehousing clerk will use a pleasant voice, speak clearly, use motivation, etc., to sell the service. Then have the students discuss how motivation and proper telephone techniques can increase sales, create goodwill, etc. for the company. Create some tapes of telephone sales and conversations. Have students listen to these tapes and evaluate them. Then have the students write a report on the tape. The report should include; good and bad points along with suggestions for improvement.	1513 Selling Principles and Practices Pages 359-361 Retail Principles and Practices Pages 395-397 Fundamentals of Selling Chapter 12, b Retail Selling Chapter 27 2nd Edition

Cluster Instructional Objective: ABILITY TO COMPREHEND THE IMPORTANCE OF INTERPERSONAL RELATIONS

TW-45

What Does the Competent Marketing Employee Do?

1514-Knowledge of/or Understanding that

Success or failure depends not alone on technical proficiency, but on quality of interpersonal relations as well.

Suggested Learning Activities

Have your students break into small groups. Then have them discuss personality traits which a T & W employee should possess; such as dependibility, loyalty, and desire to work. Compile a total list with the suggestions from each group. Then as a class discuss why these traits are important to the customer buying process.

In a class discussion, have the students react to the following question: Have you ever come in contact with a saleperson with excellent technical knowledge, but little ability to relate to you on a personal level? What was your reaction and how did it effect the sale?

After the discussion is concluded, have the students write a short paper on the need for interpersonal relationships in the Transportation and Warehousing Industry.

References

Human Relations in Marketing
Chapter 5

Human Relations in Business
Chapter 10

Owning and Operating a Small Business
Unit 11

Fundamentals of Selling
Pages 232-34

Cluster Instructional Objective: COMPREHEND HOW TO REINFORCE POSITIVE BEHAVIOR AND PROVIDE CONSTRUCTIVE CRITICISM

TW-46

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1515-Knowledge of/or Understanding that The ways to reinforce positive behavior and provide constructive criticism.	Have the students read the pages of the reference, "Human Relations in Buiness." Then have them write a paper reacting to the following statement made by a transportation and warheousing supervisor. "When it comes to discipline, I let my employee's have it. They will never make that mistake again." Have the student include suggestions as to how the transportation and warehousing supervisor should handle disciplining his/her employee's. Have students with the same transportation and warehousing occupation get together into a group. Then have the group discuss how their training sponsors offer constructive criticism and reinforce a positive attitude. Then have each group give a summary to the class. Have the students include the good and bad points along with suggestions for improvement in the oral summary.	1515 Human Relations in Business Pages 203-206 Warehousing--A Guide For Both Users and Operators Chapter 13 Starting Your Own Marketing Business Page 133 Retailing Principles and Practices Page 347

Cluster Instructional Objective:

ACQUIRE AN AWARENESS THAT PERSONAL ADVANCEMENT AND PROSPERITY IS DEPENDENT ON THE SUCCESS OF THE COMPANY

TW-1

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1001-Attitude A belief that personal advancement and prosperity can be determined by the contribution made to the success of the business employed in. Common to Food Marketing Wholesaling	Divide the class into groups of two, three, or four students. Have each group determine a basis for advancement in a hypothetical transportation and warehousing organization. Compare results of the groups and relate factors of contribution to personal advancement. Encourage students to interview transportation and warehousing executives. The interviews should provide information concerning the reasons why these executives acquired the position they now hold. A report can then be made for class discussion. Develop a bulletin board which underscores that hard work, determination, etc. contribute to personal advancement.	1001 Retailing Principles and Practices Part 60 7th Edition, 1981 The Economics of Marketing Chapter 2 Retail Merchandising Chapter 17 Merchandising Mathematics Part 5

Cluster Instructional Objective: COMPREHEND THE FLOW OF GOODS AND SERVICES FROM PRODUCER TO CONSUMER

TW-2

What Does the Competent Marketing Employee Do?

1018-Knowledge of/or Understanding that

The student should be able to understand the flow of service from the producer to the point of sale--channels of distribution.

Suggested Learning Activities

In small groups have students trace a product from the production stage to the point of distribution. This can be completed by field interviews with businesses in the community.

Upon completion of interviews have the group develop a poster diagramming this process. The group should then present the information to the class.

After discussing the various channels of distribution, have the students make a list of 3-5 products and trace the channels the products would go through before reaching the ultimate consumer.

References

1018

Your Job in Distribution
Unit 2

Warehousing--A Guide For Both Users and Operators
Chapter 2

Physical Distribution Management

Materials Handling
Unit 1
Part 1

Marketing and Distribution
Unit 5
Part 14

Basic Retailing and Distribution
Pages 55-59

Cluster Instructional Objective: COMPREHEND THE DIFFERENT TYPES OF BUSINESSES INVOLVED IN THE DISTRIBUTION OF GOODS AND SERVICES

TW-3

What Does the Competent Marketing Employee Do?

1019-Knowledge of/or Understanding that

The student should be aware of all the businesses that take part in the movement of goods from the producer to the point of sale and the work they perform--channels of distribution.

Suggested Learning Activities

Break the class into small groups. Have each group develop a list of businesses that would be involved with the channels of a given product. Give each group a different product. The groups should present the information to the class.

After discussing channels of distribution have students complete the following form:

Product	Channels of Distribution	Transportation Method
*All products are at the manufacturers		
2 cases of jewelry		
1000lbs. metal pipes		
100 cases can goods		
100 dresses		
1ton of forms for industry (metal)		

References

1019

Your Job in Distribution
Unit 2

Marketing and Distribution
Unit 5
Part 14

Basic Retailing and Distribution
Pages 55-59

Materials Handling
Unit 1
Part 1

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF THE PERSONNEL ORGANIZATION

What Does the Competent Marketing Employee Do?

759-Attitude

That lines of authority should be followed so that a department head or supervisor's position may not be weakened by management dealing directly with employees on matters that are logically in the supervisor's domain.

Common to
    Food Marketing
    Wholesaling
    Finance and Credit

Suggested Learning Activities

Have students draw an organizational chart for their training stations. The students should identify lines of authority. Once everyone has an organizational chart, have a class discussion on why lines of authority should be followed.

Devise a case problem where an employee by-passes the department head to register a complaint. Have students discuss the problems which could be encountered as a result of this action.

References

LAP 1-759

Retail Merchandising
    Chapter 5, e

Retailing Principles and Practices
    Part 32, 34
    7th Edition, 1981

Fundamentals of Selling
    Chapter 7, e

Psychology and Human Relations in Marketing
    Chapters 3, 7

Introduction to Wholesale Distribution
    Chapter 2

Cluster Instructional Objective: IDENTIFY THE EFFECT OF POLICY MAKING IN MARKETING AND DISTRIBUTION

What Does the Competent Marketing Employee Do?

743-Attitude

A belief that there should be a constant and intelligent effort on the part of management to be absolutely fair in every policy and every practice.

Common to
    Food Marketing
    General Retail Merchandising

OTHER CLUSTER COMPETENCIES

749-Attitude

Suggested Learning Activities

Have students conduct a panel discussion on why policies and procedures are necessary for employees, supervisors, and management.

Contrive a case problem about a situation where there is no policy (i.e., how often employees should work weekends). In the case, have one employee refuse to work one weekend because he/she has worked the past several weekends while another employee has never worked on the weekend. Have students determine how the supervisor should handle the situation since there is no policy to guide the decision. Also, ask students to elaborate on the importance of employee policies.

References

LAP 3-743

Retailing Principles and Practices
    Part 20

Retailing Principles and Practices
    Part 34
    7th Edition, 1981

Introduction to Wholesale Distribution
    Chapter 2

Wholesale Mangement
    Assignments 6, 7, 13, 14

Cluster Instructional Objective: IDENTIFY THE EFFECT OF POLICY MAKING IN MARKETING AND DISTRIBUTION

What Does the Competent Marketing Employee Do?

749-Attitude

Attitude that management, supervisors, and employees require a framework of policies and procedures within which to operate.

Common to
  Food Marketing
  General Retail Merchandising
  Finance and Credit

OTHER CLUSTER COMPETENCIES

743-Attitude

Suggested Learning Activities

Have students conduct a panel discussion on why policies and procedures are necessary for employees, supervisors, and management.

Contrive a case problem about a situation where there is no policy (i.e., how often employees should work weekends, etc.). In the case, have one employee refuse to work one weekend because he/she has worked the past several weekends while another employee has never worked on the weekends. Have students determine how the supervisor should handle the situation since there is no policy to guide the decision. Also, ask students to elaborate on the importance of employee policies.

References

LAP 3-749

Salesmanship Fundamentals
  Chapter 22

Basic Retailing and Distribution
  Unit 41

Retailing Principles and Practices
  Part 4

Retail Merchandising
  Chapter 5

Retailing Principles and Practices
  Part 32
  7th Edition, 1981

Fundamentals of Selling
  Chapter 7

Cluster Instructional Objective: IDENTIFY THE IMPORTANCE OF HAVING EMPLOYEE EVALUATIONS

TW-4

What Does the Competent Marketing Employee Do?

610-Knowledge of/or Understanding that

Company employee evaluations, policies and procedures.

Common to
Food Marketing

Suggested Learning Activities

Have students interview the person in charge of personnel at their training station. Have students find out how the employees are evaluated and what is done with the evaluation once it has been completed. Have the students investigate if there is some type of corrective action taken when needed and does the evaluation lead to pay raises or dismissal?

Have students determine how important evaluations are to the personnel function.

References

LAP 12-610

Retailing Principles and Practices
Parts 34, 53
7th Edition, 1981

Retailing Principles and Practices
Parts 20, 57

Warehousing--A Guide For Users and Operators
Page 147

Wholesale Management
Assignment 14

Retail Merchandising
Chapter 5, e

Cluster Instructional Objective: IDENTIFY THE IMPORTANCE OF HAVING EMPLOYEE EVALUATIONS

What Does the Competent Marketing Employee Do?

729-Skill

Ability to tactfully identify mistakes employees have made and help them constructively correct them.

Suggested Learning Activities

Have the class draw numbers for partners. Once partners are assigned, have one assume the role of the manager and the other the employee. Give each group a situation to work with, for example, the employee has been incorrectly filling out the bill of lading, or the company has received complaints about the employee's phone techniques. Have the manager discuss with the employee how to correct the problem. Try to listen to each group briefly. After the role-play situation is complete, have the employee react to how they felt during the discussion and what the manager could do to improve the situation.

Following this, have the partners switch roles giving the new manager a different situation. Hold a class discussion on the role-play situation.

References

LAP 12-729

Human Relations in Business
Pages 203-206

Warehousing--A Guide For Both Users and Operators
Chapter 13

Starting Your Own Marketing Business
Page 133

Fundamentals of Selling
Page 232

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF A CONTINUOUS PROGRAM OF MANAGEMENT RECRUITMENT AND TRAINING IN BUSINESS

TW-6

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
789-Attitude That in order to be best prepared for future management responsibilities, trainees must be willing to work and train in various capacities within a company operation. Common to Food Marketing General Retail Merchandising Finance and Credit OTHER CLUSTER COMPETENCIES 790-Attitude	Invite a guest speaker from a Transportation and Warehousing company to speak on their management trainee programs. Ask the speaker to stress to the students why most manager trainees are required to work in different departments throughout the business. Devise a role-playing situation where two employees are being interviewed for the same promotion to a manager's position. Have one student be an employee who has worked in every department within the store. Have another student be an employee who has been employed by the store longer, but who has worked in only one department. Have a third student or you be the interviewer. The balance of the class should observe the role-playing and decide which employee should be given the promotion. Follow this activity with a class discussion on why the one was selected over the other. Invite a guest speaker from a local small Transportation and Warehousing company to explain how informal management training is conducted.	LAP 13-789 Marketing and Distribution Page 532 Retailing Principles and Practices Units 1, 13 Part 20 Retail Selling Chapter 1 Page 59 Fundamentals of Selling Chapter 7, e Introduction to Wholesale Distribution Chapter 3 Page 292

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF A CONTINUOUS PROGRAM OF MANAGEMENT RECRUITMENT AND TRAINING IN BUSINESS

TW-7

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
790-Attitude That time spent training management trainees is worthwhile to the future of the business. Common to Food Marketing OTHER CLUSTER COMPETENCIES 789-Attitude	Have students break into small groups and brainstorm the following topic: "Do you think that training assistant managers are worthwhile to the future of the business?" Have one student act as recorder and write a summary of the major points. This summary should be submitted to you, or you could discuss their findings with the group. Lecture to the students on the benefits of promotion and training from within the organization. Then ask the students if they are familiar with what their training station provides in the way of additional training opportunities, especially training assistant managers for potential store managers. If not, have them find out what training opportunities are available at their training station.	LAP 13-790 Retail Merchandising Chapter 5, e Psychology and Human Relations in Marketing Chapters 5, 7, 8 Warehousing--A Guide For Both Users and Operators Chapter 13 Supervisory Skills in Marketing Chapter 5 Retailing Principles and Practices Parts 33, 53

Cluster Instructional Objective: ACQUIRE AN AWARENESS OF THE IMPORTANCE OF SCHEDULING AND ORGANIZATION OF WORKLOAD

TW-8

Management 6

What Does the Competent Marketing Employee Do?

782-Attitude

That careful scheduling and organization of workloads help maintain high employee morale and work performed according to schedule.

Suggested Learning Activities

Break the class into small groups and have them discuss the following case:

Mr. Keller, the new manager has had several complaints from employees concerning their work. Since he has started, he has had to work on Saturdays because the work was not finished by Friday. Some of the employee's have had their hours cut, while others are working overtime. What is the problem and how would you correct it? Also, what effect will this problem have on employee moral.

References

LAP 14-782

Warehousing--A Guide For Both Users and Operators
Chapter 16

Basic Retailing and Distribution
Unit 38

Industrial Traffic Management
Chapter 14

Human Relations in Business
Chapter 15

Small Business Management
Chapter 8

Cluster Instructional Objective: IDENTIFY THE MOST EFFICIENT METHODS TO COMPLETE A WORK ASSIGNMENT

TW-9

What Does the Competent Marketing Employee Do?

695-Skill

Ability to determine in various situations the most efficient way to get the job accomplished.

Common to
Food Marketing
General Retail Merchandising
Finance and Credit

OTHER CLUSTER COMPETENCIES

731-Skill

Suggested Learning Activities

Have students read reference material on managing time for efficiency. The student should make notes on the most important time management factors for efficient job performance.

Have students ask their training station manager or a local business manager for the principles/techniques the manager uses to improve job efficiency.

Have students interview three supervisors and three managers to seek their opinions on how to obtain the most efficient job performance. The students should ask the supervisors and managers for concrete illustrations of how they have improved employee efficiency. The students should also try to find out if the supervisors and managers feel that human relations factors affect job efficiency.

References

LAP 17-695

Retail Merchandising
  Chapter 19, e
  Chapter 11, b

Retailing Principles and Practices
  Part 20

Retail Selling
  Chapter 9
  2nd Edition

Marketing and Distribution
  Part 45

Fundamentals of Selling
  Chapter 3, c

Psychology and Human Relations in Marketing
  Chapter 3

Retailing Principles and Practices
  Part 34
  7th Edition, 1981

Cluster Instructional Objective: IDENTIFY THE MOST EFFICIENT METHODS TO COMPLETE A WORK ASSIGNMENT

TW-10

What Does the Competent Marketing Employee Do?

731-Skill

Ability to think ahead and plan for any emergencies that might arise.

Common to
Food Marketing
Finance and Credit

OTHER CLUSTER COMPETENCIES

695-Skill

Suggested Learning Activities

Present students with a case problem dealing with employee unrest due to the fact that the store has been robbed three times in the past year. Then ask the students what they would do in order to quiet the unrest of the employees, thus trying to prevent something else from happening.

Present students with a problem that has three solutions. One solution should be short-range, such as large profit; the second solution should be middle-range, such as doing something at the expense of future growth; and the third solution should be long-range, which would be more expensive at the beginning but would return more profits over the longer period of time. See which solution the students select and then discuss with them the importance of being able to think ahead.

References

LAP 17-731

Psychology and Human Relations in Marketing
Chapters 3, 7

Retail Selling
Chapter 15

Retail Merchandising
Chapter 17

Retailing Principles and Practices
Unit 17
7th Edition, 1981

Supervisory Skills in Markeitng
Chapter 2

Cluster Instructional Objective: ABILITY TO RELATE GOOD DELIVERY SYSTEM TO CUSTOMER SATISFACTION

TW-11

6

Management

What Does the Competent Marketing Employee Do?

756-Attitude

An awareness that to improve delivery service, transactions should be recorded accurately and legibly and delivery dates promised carefully.

Common to
    General Retail Merchandising
    Wholesaling

Suggested Learning Activities

Have students do the following case problem:

A new transportation department manager has announced that, effective next week, delivery of all items will be discontinued. The reason given for discontinuing this service is, "delivery services do not affect customers' attitudes toward the store." As the operations manager of the store, you have been asked to present a one-page "position" paper concerning your feelings about this change. Submit your position paper to the teacher for review.

Role playing situation: Have one student assume the role of supervisor over the delivery operations of a transportation department. Complaints have been increasing concerning the inefficient delivery service. The supervisor feels the sales personnel (the balance of the class) make delivery date promises to the customers that cannot realistically be met. The supervisor feels this is the primary reason for the customers complaints. Next week the supervisor will have an opportunity to speak to all employees. Have the supervisor prepare a three to five minute presentation to explain the necessity of accurate, legible, and realistic delivery date promises to customers. Have students read the section on "Service Policies."

References

LAP 31-756

Fundamentals of Selling
    Chapter 7, d

Retail Selling
    Chapter 30
    2nd Edition

Retailing Principles and Practices
    Part 28, 29
    7th Edition, 1981

Retail Merchandising
    Chapter 5, b

Warehousing--A Guide For Both Users and Operators
    Chapter 5

Cluster Instructional Objective: KNOWLEDGE OF HOW TO BUILD EMPLOYEE MORALE, MOTIVATION AND LOYALTY

TW-12

6

Management

What Does the Competent Marketing Employee Do?

1201-Knowledge of/or Understanding that

How to build employee morale, motivation and loyalty.

Suggested Learning Activities

Have the students find and read selected writings of chapters on motivation, building morale and loyalty. (They can do this in small groups or teams; each team taking one section.) Each group should then come up with a "model" (flowchart, etc., depicting the building of morale, motivation or building of loyalty.

The following incidents should be discussed in class in terms of morale and loyalty building and motivation:

Jack Snow is a 55 year old middle-manager. He has not been promoted in 7 years and chances are he will not be in the next 10 years. Lately his work has not been up to his former standards of excellence.

BRT airlines has, like all other airlines, been plauged with an increase in employee turnover throughout the past 5 years. BRT's turnover rate has increased from 4% to over 12% in recent months.

References

1201

Aim for a Job in the Trucking Industry
Chapter 14

Human Relations in Business
Chapter 3

Retail Merchandising
Chapter 5

Retail Selling
Chapter 5
2nd Edition

Warehousing--A Guide For Both Users and Operators
Chapter 13

Cluster Instructional Objective: KNOWLEDGE OF CUSTOMER SERVICE POLICIES

TW-13

6

Management

What Does the Competent Marketing Employee Do?

1202-Knowledge of/or Understanding that

Plans and policies related to customer service.

Suggested Learning Activities

Have the students learn the plans and policies related to customer services at their own jobs. Have them give a short presentation as to why these specific plans and policies are good for their company.

Have the students break into small groups. In a few minutes have them select a business (fact or fiction) and criteria related to that business (number of customers serviced per day, number of marketing people servicing these customers, etc.). Then have them discuss and list possible plans and policies that their company would want to have as they relate to customer service.

References

1202

Warehousing--A Guide For Both Users and Operators
Chapter 4

Introduction to Wholesale Distribution
Pages 283-286

Wholesale Management
Page 44

Wholesaling and Physical Distribution
Chapter 3

Cluster Instructional Objective: KNOWLEDGE OF THE DIFFERENT TYPES OF CARRIERS

What Does the Competent Marketing Employee Do?

1203-Knowledge of/or Understanding that

Advantages and disadvantages of types of carrier services (motor, rail, air, U.P.S., etc.).

Suggested Learning Activities

In small groups have the students discuss the advantages and disadvantages of different types of carrier services. As a group discuss which services may be used in what specific incidences.

Have the students prepare an interview sheet and have them interview a wide range of businesses asking them what type of carrier service they prefer and why. Have them find out what the company sees as advantages to the type of carrier they use. (Each student should interview from three to five companies.)

References

1203

Materials Handling
Unit 6

Transportation
Chapters 5, 6, 7

Practical Handbook of Industrial Traffic Management
Chapters 10, 11

Wholesaling and Physical Distribution
Chapter 6

Physical Distribution
Chapters 5, 6

Cluster Instructional Objective: SKILL IN DETERMINING EQUIPMENT NEEDS TW-15

What Does the Competent Marketing Employee Do?

1204-Skill

Ability to determine equipment needs.

Suggested Learning Activities

Have students list some of the equipment used in their companies. Have the class brainstorm and list criteria used in determining equipment needs. Have the students do the following case problem:

The "BIG" Company stores industrial motors ranging from 2 horsepower to 50 horsepower and approximately 50% of the motors are 30 hrp. or more. It is a small company that operates in the Chicago metropolitan area with three warehouses throughout the area. Each warehouse is capable of storing 4000 to 7000 motors depending on the size. Each is open 24 hrs/day (3 shifts), 5 days/week and has four employees and a supervisor on each shift. Turnover of merchandise is rapid and the employees work hard for eight hours a day. Each warehouse is equipped with 1 fork-lift, 2 four-wheel trucks and 2 two-wheel trucks. The fork-lift is used only for motors over 25 hrp. Determine the equipment needs for the following situations:

A. Warehouse A is being expanded to hold 5000-9000 motors; 80% will be over 30 hrp. One additional employee per shift will be added.

B. Warehouse B is no longer housing motors under 25 hrp.

C. Warehouse C is tripling its capacity. It's also adding one more worker per shift.

References

1204

Practical Handbook of Industrial Traffic Management
Pages 211-214

Warehousing--A Guide For Both Users and Operators
Chapter 17

Materials Handling
Part 35

Warehousing
Assignments 3, 4

Cluster Instructional Objective: SKILL IN ROUTING SHIPMENTS

TW-16

Management 6

What Does the Competent Marketing Employee Do?

1205-Skill

Ability to route shipments by appropriate carrier and route.

Suggested Learning Activities

Have students list criteria for using specific carriers and routes from their jobs. In small groups discuss possible reasons why those carriers and routes are used.

In a simulation one student will feed shipping requirements to another student who will examine the requirements and then route the shipments appropriately.

References

1205

Transportation
Chapter 4

Practical Handbook of Industrial Traffic Management
Chapter 6

Warehousing--A Guide For Both Users and Operators
Pages 79-80

Introduction to Wholesale Distribution
Chapter 8

Materials Handling
Pages 72-75

Cluster Instructional Objective: SKILL IN SETTING UP PICK-UP AND DELIVERY SCHEDULES

TW-17

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1206-Skill Ability to set up carrier pick-up and delivery sites.	Discuss the criteria involved in setting up carrier pick-up and delivery sites. Have each student list the different delivery and pick-up sites used by his/her company. In small groups the students should discuss his/her delivery sites and how and why they are set up the way they are. In groups of two, students will develop imaginary companies with imaginary pick-up and delivery sites. Included will be a schedule of expected deliveries and pick-ups of various products. Groups will then switch companies with other groups. Using criteria suggested in class or obtained from training site, each group will attempt to set up carrier pick-up and delivery sites.	1206 Transportation Chapter 4 Practical Handbook of Industrial Traffic Management Chapter 6 Warehousing--A Guide For Both Users and Operators Pages 79-80 Introduction to Wholesale Distribution Chapter 8 Materials Handling Pages 72-75

Cluster Instructional Objective: SKILL IN PREPARING SHIPPING RECORDS

TW-18

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1207-Skill Ability to prepare shipping records and how they relate to billing, inventory control and other related functions.	Have students bring in bills of lading, freight bills, load manifests, etc. from their job. Discuss the similarities and differences in the documents from company to company. Have class identify the parts of these documents and the importance of having them on the document. In small groups have students fill out copies of documents and give other members of the group copies of their own to fill out. Have the class discuss problems and things to watch out for in filling out such documents. Discuss the consequences of falsely preparing or wrongly preparing the documents.	1207 Wholesale Management Assignment 12 Warehousing Assignments 8, 15 Materials Handling Part 32 Introduction to Wholesale Distribution Chapter 12 Warehousing--A Guide For Both Users and Operators Chapter 5

Cluster Instructional Objective: SKILL IN PREPARING VARIOUS DOCUMENTS TW-19

What Does the Competent Marketing Employee Do?

1208-Skill

Ability to prepare various documents such as bills of lading, freight bills, load manifests, delivery receipts, etc.

Suggested Learning Activities

Have students bring in bills of lading, freight bills, load manifests, etc. from their job. Discuss the similarities and differences in the documents from company to company. Have class identify the parts of these documents and the importance of having them on the document. In small groups have students fill out copies of documents and give other members of the group copies of their own to fill out.

Have the class discuss problems and things to watch out for in filling out such documents. Discuss the consequences of falsely preparing or preparing the documents wrong.

References

1208

Practical Handbook of Industrial Traffic Management
Chapter 4

Transportation
Chapter 9

Wholesaling and Physical Distribution
Chapters 5, 7

Physical Distribution
Chapter 2

Warehousing
Assignment 8

Introduction to Wholesale Distribution
Chapter 3

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: SKILL IN DETERMINING RATES

TW-20

6

Management

What Does the Competent Marketing Employee Do?

1209-Skill

Ability to classify freight in order to determine rates.

Suggested Learning Activities

Have student bring in classification index from job. Have him/her explain to the class the similarities between the items that are classified together.

On small pieces of paper have students write the type of freight to be classified, one to a paper. On a separate sheet have them list the broad classifications that the type of freight falls into. Pairing the students up, have them exchange the sheet of classification categories and the small papers with the freight to be classified. See if they can classify another students' freight. Then, see if they can classify their own.

Have students brainstorm in small groups for two minutes listing all possible kinds of freight they can. Then have them classify the freight using whatever criteria they wish. As a group, discuss the ways the freight was classified letting members of the class express their feeling as to the appropriateness of the classifications.

References

1209

Transportation
Chapter 10

Practical Handbook of Industrial Traffic Management
Chapter 5

Materials Handling
Unit 6

Warehousing--A Guide For Both Users and Operators
Chapter 7

Physical Distribution
Chapter 7

Wholesaling and Physical Distribution
Chapter 6

Cluster Instructional Objective: SKILL IN CUSTOMER COMMUNICATIONS TW-21

What Does the Competent Marketing Employee Do?

1210-Skill

Ability to answer customer questions on rates, routing, packaging, etc.

Suggested Learning Activities

Discuss the importance of being able to answer questions on the following and why prompt accurate answers are important to the firms business.

Given information on rates, routing, packaging, etc., have students role-play a situation in which one student is the person with the information and other students are customers who either call on the phone or visit in person. Some example questions should be discussed before role-play in order to give the customers a basis for questioning.

References

1210

Communications in Marketing
Chapter 3
2nd Edition

Wholesaling and Physical Distribution
Chapter 3

Warehousing--A Guide For Both Users and Operators
Chapters 4, 5

Introduction to Wholesale Distribution
Pages 283-286

Cluster Instructional Objective: SKILL IN CALCULATING FREIGHT CHARGES TW-22

6 Management

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1211-Skill Ability to calculate freight charges on shipments moving over more than one carrier.	Have students find out rules for calculating freight charges in their own company for shipments moving over more than one carrier. Have them bring in necessary rate tables, etc. Have each student design two case incidents where the ability to calculate freight charges in shipments using more than one carrier is necessary. Have them exchange problems with another student and perform the calculations. Have students discuss what an employee must do in order to calculate freight charges on shipments moving over more than one carrier. Have them discuss the similarities and differences with regards to other types of shipments where only one carrier is used.	1211 Transportation Chapter 10 Practical Handbook of Industrial Traffic Management Chapter 5 Materials Handling Part 22 Warehousing--A Guide For Both Users and Operators Chapter 7 Physical Distribution Chapter 7 Wholesaling and Physical Distribution Chapter 6

Cluster Instructional Objective: SKILL IN CALCULATING RATES TW-23

6

Management

What Does the Competent Marketing Employee Do?

1212-Skill

Ability to calculate rates on quantity and LTL shipments.

Suggested Learning Activities

Have students bring in rate schedules from the job if possible. Discuss the differences in calculating rates for quantity and LTL shipments discussing what constitues an LTL shipment. Discuss the importance of accurate calculations in calculating rates including possible consequences of miscalculations.

As a class make up a phony company and product. Design or use an existing rate schedule. In small groups discuss what rates would be depending on where you were sending the product and whether on quantity or LTL shipments.

References

1212

Transportation
Chapter 10

Materials Handling
Part 22

Warehousing--A Guide For Both Users and Operators
Chapter 7

Physical Distribution
Chapter 7

Wholesaling and Physical Distribution
Chapter 6

Cluster Instructional Objective: HAVE AN AWARENESS OF THE LINES OF AUTHORITY IN A COMPANY

TW-24

What Does the Competent Marketing Employee Do?

1213-Knowledge of/or Understanding that

Know and understand the company chain of command/authority.

Suggested Learning Activities

Present information on the topic Chain of Command. Following the discussion, have each student develop an organizational chart for their training station or for a local transportation and warehousing firm. This chart should be based on authority and should show where the student is on the company's organizational chart.

References

1213

Marketing and Distribution
Unit 11

Marketing in Action
Chapter 18

Industrial Traffic Management
Chapter 14

Retailing Principles and Practices
Parts 32, 34
7th Edition, 1981

Cluster Instructional Objective: COMPREHEND THE EFFECT OF OFFERING A PARTS DELIVERY SERVICE IN PROMOTING GOOD PUBLIC RELATIONS

TW-25

Management 6

What Does the Competent Marketing Employee Do?

1214-Attitude

An awareness of the part delivery service plays in promoting good public relations for the company.

Suggested Learning Activities

Invite a guest speaker from a local transportation and warehousing firm to talk on the importance that delivery plays in promoting good public relations.

Have the students write a short paper on how each of the following items need or do not need to be delivered by a transportation and warehousing firm to promote good public relations.

1. Data processing equipment for a university.
2. 100 cases of canned goods for a supermarket.
3. 25lbs. of fertilizer for an individual firm.

Have the students turn the papers in to you and discuss the results in class.

References

1214

Aim for a Job in the Trucking Industry
Unit V

Industrial Traffic Management
Chapter 14

Basic Retailing and Distribution
Unit 39

Retailing Principles and Practices
Pages 586-587

Cluster Instructional Objective: DEMONSTRATE AND REALIZE THE IMPORTANCE OF PREPARING A SALES CHECK

TW-1

7

Mathematics

What Does the Competent Marketing Employee Do?

374-Skill

In accurately calculating the exact amount of a customer's purchase.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

OTHER CLUSTER COMPETENCIES

390-Attitude

Suggested Learning Activities

Provide students with sales checks and have them complete the following type of problem:

Mr. W.T. Jones, a transportation and warehousing buyer, purchased the following items:

7 typewriters	@	$ 375.00	each
12 tires	@	62.00	each
3 fork lifts	@	3,650.00	each

Have students keep a record of errors that were made at their training stations or in class assignments in calculating sales checks. Have the student tally the location of errors on a blank sales check to indicate where mistakes are occuring most frequently. Students should pay special attention in these areas until improvement is noted.

Prepare a series of sales checks that have been filled out incorrectly. Have the students identify the mistake(s) and make the necessary correction(s).

References

LAP 10-374

Physical Distribution
    Chapters 2, 3

Mathematics in Marketing
    Chapter 2
    2nd Edition

Wholesaling and Physical Distribution
    Chapters 5, 7

Industrial Traffic Management
    Chapter 4

Materials Handling
Traffic and Transportation
    Unit 5

Transportation for Marketing Students
    Chapter 9

Introduction to Wholesale Distribution
    Chapter 3

Cluster Instructional Objective: DEMONSTRATE AND REALIZE THE IMPORTANCE OF PREPARING A SALES CHECK

TW-2

What Does the Competent Marketing Employee Do?

390-Attitude

That carefully calculating the exact amount of customer's bills will prevent losses.

Common to
Finance and Credit
General Retail Merchandising
Wholesaling

OTHER CLUSTER COMPETENCIES

374-Skill

Suggested Learning Activities

Have students read the following case problem and answer the three questions that follow:

CASE:

A student neglected to write the stock numbers of merchandise sold on the sales check as required by the transportation and warehousing department manager. The next day, the manager informed the student of the mistake.

A. How should the student respond to the manager?

B. Why should the department manager be so concerned about the error?

C. Would there be any inconvenience to the customer?

Have students do a research project on causes of errors on sales slips. They can research the dollar amount of sales lost by poor inventory control by discussing this with department or general manager.

References

LAP 10-390

Retailing Principles and Practices
Part 49

Retail Merchandising
Chapter 16, d

Fundamentals of Selling
Chapter 12, d

Retail Selling
Chapter 14

Warehousing--A Guide For Both Users and Operators
Chapter 5

Warehousing
Assignment 5

Industrial Traffic Management
Chapter 4

Cluster Instructional Objective: DEMONSTRATE SKILL IN USING AND INTERPRETING RATES, SCHEDULES

What Does the Competent Marketing Employee Do?

366-Skill

In using and interpreting transportation rate schedules in determining transportation charges.

OTHER CLUSTER COMPETENCIES

378-Skill

Suggested Learning Activities

Assign students to obtain a rate schedule from their training sponsor or a local transportation and warehousing firm.
A. Have the students list ten possible combinations of cities where the firm makes deliveries.
B. Based on the combination in A, the student should compute the necessary charges using hypothetical weights.

Break students into small groups. Have students select a member to interview a rate clerk or rate analyst in a transportation and warehousing firm. The student should collect examples of material used at the firm. These examples can then be used as a basis of a report to the class indicating:
A. What is done
B. How to use materials
As an additional extra credit assignment, the students could explain the duties of a rate clerk or rate analyst or invite the person they interviewed to speak to the class.

Locate and duplicate rate schedules from a sample of transportation and warehousing firms. Review the forms and schedules with the class highlighting differences, similarities, etc. Also, develop problems that could be used with the schedules obtained.

References

LAP 28-366

Industrial Traffic Management
Chapter 5

Transportation for Marketing and Business Students
Chapter 10

Physical Distribution
Pages 35, 36

Wholesaling and Physical Distribution
Pages 91, 92

Cluster Instructional Objective: DEMONSTRATE SKILL IN USING SHIPPING TERMS

What Does the Competent Marketing Employee Do?

378-Skill

In using such shipping terms as F.O.B. and C.O.D.

OTHER CLUSTER COMPETENCIES

366-Skill

Suggested Learning Activities

Ask students to visit a traffic manager of a transportation or warehousing firm to identify the difference in various F.O.B. and C.O.D. terms. The students should report their findings to the class.

Prepare sample hypothetical problems for students which must be completed within a specified period of time. Example: The XYZ Company shipped a variety of equipment to a retail store in Arkansas. The shipping terms were F.O.B. destination. The equipment was destroyed in transit. Will XYZ or the retail store be responsible for the loss? Why?
Review the following terms:

- F.O.B. Factory
- F.O.B. Destination
- F.O.B. Shipping Point
- F.O.B. Destination, Charges reversed
- F.O.B. Factory, Freight prepaid
- C.O.D.

After completing the review, students should write six purchase orders. Each order should contain a different shipping term and an explanation of what the term means.

References

LAP 28-378

Wholesaling and Physical Distribution
Page 60

Physical Distribution
Page 105

Materials Handling
Traffic and Transportation
Part 14

Introduction to Wholesale Distribution
Chapters 7, 8

Warehousing--A Guide For Both Users and Operators
Pages 92-95

Industrial Traffic Management
Pages 115-120

Cluster Instructional Objective: COMPREHEND HOW GROSS MARGIN IS DETERMINED

What Does the Competent Marketing Employee Do?

350-Knowledge of/or Understanding that

A company's gross margin should cover operating expenses and provide a percentage of profit.

Common to
Food Marketing

Suggested Learning Activities

Have students consult selected readings and determine what gross margin is and how gross margin is determined. Then students can discuss their findings with you. Once you are sure they understand gross margin, have students work five problems dealing with gross margin giving them the gross margin formula.

Have students consult selected readings and determine what gross margin is and how gross margin is determined. Then students can prepare a one-page report on how businesses determine what their gross margin has to be in order to make a profit. Students should include examples and illustrations in the report. The report should be turned in to you.

References

LAP 38-350

Retail Merchandising
Chapter 15

Fundamentals of Selling
Chapter 15, D

Retail Selling
Pages 185, 390

Retailing Principles and Practices
Parts 60, 68
7th Edition, 1981

Cluster Instructional Objective: KNOW HOW TO SELECT THE TYPE OF TRANSPORT SERVICE UNDER DIFFERENT CONDITIONS

TW-1

What Does the Competent Marketing Employee Do?

646-Knowledge of/or Understanding that

The various modes of transportation used in shipping merchandise from vendor to store.

Suggested Learning Activities

Present various types of shipments to students. Ask them to suggest the most suitable means of transport based on service requirements and cost.

A. A 50 lb. sample to a prospective customer 200 miles away. (U.P.S.)

B. Same shipment to a prospective customer 2,000 miles away. (Federal Express or Air Freight)

C. A 10,000 lb. shipment of "sale" goods to a store 200 miles away. (Motor Carrier)

D. A 50,000 lb. shipment to inventory in a regional warehouse. (Rail)

References

LAP 3-646

Domestic Transportation
Chapters 4, 5, 8

Contemporary Physical Distribution
Chapter 4

Management of Physical Distribution and Transportation
Chapter 5

Materials Handling
Part 12

Industrial Traffic Management
Chapter 6

Cluster Instructional Objective: ABILITY TO HANDLE INCOMING MERCHANDISE

TW-2

9 Operations

What Does the Competent Marketing Employee Do?

638-Knowledge of/or Understanding that

The procedures involved in checking merchandise in against an invoice.

Common to
Wholesaling
Food Marketing

OTHER CLUSTER COMPETENCIES

701-Skill
708-Skill

Suggested Learning Activities

Have students ask the person responsible for receiving shipments at the school to explain the step-by-step process of accepting a shipment. Then students can compare the school's process with that of some other business (could be their training station).

Set up a role play process followed for receiving a shipment of merchandise from a trucking company. You will need to collect a quantity of boxes and papers representing the necessary forms. One student should represent the receiving clerk and another should represent the shipper. Other students could be additional receiving assistants. The rest of the group should observe the role play and make comments on improving the procedure.

Have students visit the receiving department of a local warehouse. They should have the manager show them the procedures followed in accepting a shipment from a carrier.

Have students read the chapter on "Receiving and Marketing Merchandise."

References

LAP 4-638

Warehousing
Assignments 7, 8

Retailing Principles and Practices
Parts 18, 19
7th Edition, 1981

Warehouse Management
Assignment 15

Wholesaling and Physical Distribution
Chapter 8

Physical Distribution
Chapter 4

Materials Handling
Traffic and Transportation
Part 28

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: ABILITY TO HANDLE INCOMING MERCHANDISE

TW-3

9

Operations

What Does the Competent Marketing Employee Do?

701-Skill

In determining shipping and receiving discrepancies and taking the proper action.

Common to
Wholesaling
Food Marketing

OTHER CLUSTER COMPETENCIES

638-Knowledge of/or Understanding that
708-Skill

Suggested Learning Activities

Have students prepare a bulletin board showing how merchandise is routed from the receiving dock to the proper selling department.

Have students visit a department store and have the manager walk them through the route. Merchandise follows from the receiving dock to the proper selling departments.

Have students read the section on "Receiving and Checking."

Have students read the section on "Storing and Arranging Merchandise."

Have students read the chapter on "Receiving and Marking Merchandise."

References

LAP 4-701

Physical Distribution
Chapter 4

Retailing Principles and Practices
Parts 18, 19
7th Edition, 1981

Retail Merchandising
Chapter 9, d

Retail Selling
Chapter 33
2nd Edition

Warehouse Management
Assignment 15

Warehousing
Assignment 7

Introduction to Wholesale Distribution
Chapter 7

Cluster Instructional Objective: ABILITY TO HANDLE INCOMING MERCHANDISE

TW-4

What Does the Competent Marketing Employee Do?

708-Skill

In accurately checking in merchandise against an invoice.

Common to
  Wholesaling
  Food Marketing

OTHER CLUSTER COMPETENCIES

638-Knowledge of/or Understanding that
701-Skill

Suggested Learning Activities

Have students prepare a bulletin board showing how merchandise is routed from the receiving dock to the proper department.

Have students visit a department store and have the manager walk them through the receiving and shipping room. Have the receiving foreman briefly describe the procedures used for receiving merchandise and routing it to the proper departments. After the trip, have the student compare how a transportation and warehousing company receives merchandise and routes it. They should write a paper comparing the methods of receiving and shipping.

Have students read the section on "Storing and Arranging Merchandise."

Have students read the chapter on "Receiving and Marking Merchandise."

References

LAP 4-708

Physical Distribution
  Chapter 4

Retailing Principles and Practices
  Parts 18, 19
  7th Edition, 1981

Retail Merchandising
  Chapter 9, d

Retail Selling
  Chapter 33
  2nd Edition

Warehouse Management
  Assignment 15

Warehousing
  Assignment 7

Introduction to Wholesale Distribution
  Chapter 7

Cluster Instructional Objective: ABILITY TO UNDERSTAND PROBLEMS IN RECEIVING SHIPMENTS OF MERCHANDISE

Operations

9

What Does the Competent Marketing Employee Do?

706-Skill

In following through on non-delivered or lost merchandise.

Common to
Food Marketing

Suggested Learning Activities

Devise a case problem in which ordered merchandise did not arrive at the store when it was supposed to or only a partial shipment arrived. Have students list in writing the steps to be followed in tracing the lost or non-delivered merchandise.

References

LAP 6-706

Warehousing
Assignment 7

Retailing Principles and Practices
Unit 10
7th Edition, 1981

Introduction to Wholesale Distribution
Chapter 7

Warehousing--A Guide For Both Users and Operators
Chapter 5

Wholesale Management
Assignment 15

Physical Distribution
Chapter 4

Wholesaling and Physical Distribution
Chapter 8

Cluster Instructional Objective: ABILITY TO HANDLE INCORRECTLY RECEIVED MERCHANDISE

TW-6

9

Operations

What Does the Competent Marketing Employee Do?

639-Knowledge of/or Understanding
that

The procedures for handling incorrect amounts or types of merchandise received.

Common to
Food Marketing
Wholesaling

Suggested Learning Activities

Conduct a class discussion or have students debate on which procedure is best when returning merchandise. Students could use their training station procedure as an example.

Have a group of students make a bulletin board illustrating the variety of possibilities available for disposing incorrect amounts or types of goods received by the store. Each member of the group should describe one of the procedures involved in handling the incorrect merchandise. A tape recording should be made of each student's description. When someone is looking at the bulletin board they can play the recording.

References

LAP 7-639

Retailing Principles and Practices
Part 13

Retail Merchandising
Chapter 9, b

Traffic World's Questions and Answers
Pages 17, 126

Wholesaling and Physical Distribution
Chapters 5, 7, 8
2nd Edition

Materials Handling
Unit 7, Part 29

Cluster Instructional Objective: IDENTIFY THE DIFFERENT TYPES OF STORAGES AVAILABLE FOR A BUSINESS

TW-7

Operations

9

What Does the Competent Marketing Employee Do?

648-Knowledge of/or Understanding that

Various types of storage - within the store (stockroom), outside the store (warehouse), and returned goods.

Common to
Food Marketing

Suggested Learning Activities

Have students determine where the following types of merchandise would be stored if it was within the store and if it was in the warehouse:

1. Loose items
2. Large boxes
3. Small items
4. Fast-selling goods
5. Related goods

References

LAP 10-648

Retail Merchandising
Chapter 12, d

Wholesaling and Physical Distribution
Chapter 5

Physical Distribution
Chapter 2

Introduction to Wholesale Distribution
Chapter 4

Cluster Instructional Objective: COMPREHEND THAT CONTROLLING EXPENSES SHOWS A DIRECT IMPACT ON THE STORE'S PROFIT PICTURE

9

Operations

What Does the Competent Marketing Employee Do?

618-Knowledge of/or Understanding that

Seemingly small savings in some expense areas can mean a substantial gain in profits.

Common to
Food Marketing

OTHER CLUSTER COMPETENCIES

752-Attitude
[illegible]8-[illegible]wledge of/or Understanding that

Suggested Learning Activities

Have students complete the following case problem:

The owner of a business is concerned with the relatively large expenses in operating the business. The expense areas the owner is mainly concerned with are (listed as a percentage of sales): Buying expense - 7%; supplies expense - 8%; payroll expense - 15%; receiving expense - 6%. If total sales equaled $200,000, how much could the owner add to profit if these expenses were decreased by the following amounts: Buying expense - 1%; supplies expense - 2%; payroll expense - 3%; receiving expense - .5%.

Have students complete the following case problem:

The Drake Department Store spent $7,954.32 on sales slips last year. Ten percent of the sales slips used were written out incorrectly and thus void. If the amount of void sales slips was cut down to 5%, how much can the Drake Department Store reduce this unnecessary expense?

References

LAP 15-618

Retail Merchandising
Unit 5

Retailing Principles and Practices
Unit 19
7th Edition, 1981

Introduction to Wholesale Distribution
Chapter 19
Page 295

Cluster Instructional Objective: COMPREHEND THAT CONTROLLING EXPENSES SHOWS A DIRECT IMPACT ON THE STORE'S PROFIT PICTURE

What Does the Competent Marketing Employee Do?

668-Knowledge of/or Understanding that

How to properly handle records for the effective control of the company's operation.

OTHER CLUSTER COMPETENCIES

752-Attitude
618-Knowledge of/or Understanding that

Suggested Learning Activities

Set up for a role play the process followed for receiving a shipment of merchandise from a trucking company. You will need to collect a quantity of boxes and papers representing the necessary forms. One student should represent the receiving clerk and another should represent the shipper. Other students could be additional receiving assistants. The rest of the group should observe the role play and make comments on improving the procedure.

Have students visit the receiving department of a local warehouse. They should have the manager show them the procedures followed in accepting a shipment from a carrier.

References

LAP 15-668

Industrial Traffic Management
Chapter 15
(Data Processing)

Warehouse Management
Assignment 15

Materials Handling
Traffic and Transportation
Pages 73-74

Physical Distribution
Chapter 2

Wholesaling and Physical Distribution
Page 61

Cluster Instructional Objective: COMPREHEND THAT CONTROLLING EXPENSES SHOWS A DIRECT IMPACT ON THE COMPANY'S PROFIT PICTURE

TW-10

What Does the Competent Marketing Employee Do?

752-Attitude

A realization that expenses are an influential factor in business profitability.

Common to
Food Marketing

OTHER CLUSTER COMPETENCIES

618-Knowledge of/or Understanding that
752-Attitude

Suggested Learning Activities

Bring into class sample budgets of transportation and warehousing firms. Ask the student what would happen if expenses were to increase. Show the class the mathematical results. Discuss the impact of expenses on the company's profit.

Assign a short paper to each student on the topic of "Controlling Expenses in the Transportation and Warehousing Industry in Today's Economy." In their paper the student should develop how to control expenses, the effect of expenses on profit and how today's economy is affecting business. Allow the student two weeks to research the information using books, interviews and current articles on this topic.

References

LAP 15-752

Retail Merchandising
Chapter 17, c

Warehousing--A Guide For Both Users and Operators
Chapter 20

Starting Your Own Marketing Business
Chapter 5

Owning and Operating a Small Business
Unit 8

Retailing Principles and Practices
Parts 60, 68
7th Edition, 1981

Cluster Instructional Objective: ABILITY TO UNDERSTAND THE IMPORTANCE OF PAYMENT PROCEDURES

TW-11

9 What Does the Competent Marketing Employee Do?

595-Knowledge of/or Understanding that

The company's billing procedures.

Common to
Finance and Credit

OTHER CLUSTER COMPETENCIES

738-Attitude
600-Knowledge of/or Understanding that

Suggested Learning Activities

Have students develop a step-by-step procedure for billing a customer. Start where shipment is turned over to the carrier and follow through to mailing of the bill or invoice.

Have students visit the billing department of a major store or warehouse where procedures may be observed and, if possible, the application of data processing to these procedures can be demonstrated.

References

LAP 19-595

Credit and Collections
Unit V

Retailing Principles and Practices
Unit 16
7th Edition, 1981

Basic Retail Credit
Chapter 22

Cluster Instructional Objective: ABILITY TO UNDERSTAND THE IMPORTANCE OF PAYMENT PROCEDURES

TW-12

9 Operations

What Does the Competent Marketing Employee Do?

600-Knowledge of/or Understanding that

How to handle and record customer payment of bills.

Common to
Finance and Credit

OTHER CLUSTER COMPETENCIES

595-Knowledge of/or Understanding that
738-Attitude

Suggested Learning Activities

Discussion should include the importance of accuracy in this area to the company, (accurate information on cash position, lost time and cost involved in correcting errors, etc.) and to continued good relations with the customer.

References

LAP 19-600

Wholesaling and Physical Distribution
Chapters 7, 8
2nd Edition

Retailing Principles and Practices
Parts 10, 12
Pages 28-30

Retail Merchandising
Chapter 12, a

Retail Selling
Chapters 12, 13

Cluster Instructional Objective: ABILITY TO UNDERSTAND THE IMPORTANCE OF PAYMENT PROCEDURES

TW-13

What Does the Competent Marketing Employee Do?

738-Attitude

That proper records of collections must be maintained.

OTHER CLUSTER COMPETENCIES

600-Knowledge of/or Understanding that
595-Knowledge of/or Understanding that

Suggested Learning Activities

Have the students interview the person in charge of collections at their training station or a local transportation and warehousing firm. The student should find out how records are kept and discuss the importance of records. A brief report should be given to the class. Have the class in small groups discuss and solve the following case problem:

ABC Trucking & Storage Company has been in operation for the last 30 years. They have had the same person (Mr. Smith) in charge of collections since they went into business. They have been operating at profit except for the last two years. The records for the company are all kept in several file boxes and only Mr. Smith works with the accounts. When Mr. Smith was asked to summarize the accounts and records, you notice several outstanding debts. What procedures should be taken to correct the company's records?

References

LAP 19-738

Starting Your Own Marketing Business
Page 136

Owning and Operating a Small Business
Units 7, 9

Small Business Management
Pages 181-183

Retailing Principles and Practices
Pages 277-280, 405-408

Cluster Instructional Objective: ABILITY TO DISCUSS DELINQUENT ACCOUNTS WITH CUSTOMERS

TW-14

What Does the Competent Marketing Employee Do?

603-Knowledge of/or Understanding that

How to discuss delinquent accounts with a customer, keeping that person's goodwill.

Suggested Learning Activities

Have the students interview a manager from a transportation and warehousing company in your area. Ask the manager for tips on how to approach the subject of a delinquent account while keeping that person's goodwill.

Ask students to define ways that they would like to be notified if their account happened to be delinquent.

Have students listen to a demonstration presentation on the discussion of delinquent accounts with a customer. They should make an outline of the key points presented.

The presentation should include the following characteristics:

1. Listen
2. Consider individual
3. Empathy
4. Tact
5. Policy
6. Firmness
7. Commitment

Visit a local T & W firm to determine how they discuss delinquent accounts in order to maintain goodwill.

References

LAP 20-603

Fundamentals of Selling
Chapter 7, d

Marketing in Action
Page 370

Retail Merchandising
Pages 111, 365

Materials Handling
Traffic and Transportation
Part 3

Cluster Instructional Objective: COMPREHEND THE IMPORTANCE OF COMPANY POLICIES AND PROCEDURES

9

Operations

What Does the Competent Marketing Employee Do?

798-Attitude

That the health and safety of the customers and employees depend on adherence to policies and procedures.

Suggested Learning Activities

Invite an (OSHA) Occupational Safety and Health Adminstration inspector to the class. Have the inspector discuss safety and health standards and practice plus the role of OSHA.

After the presentation have the students visit a local Transportation and Warehousing firm to determine the impact of OSHA. The students should then report back to the class.

Have students investigate the policies and procedures at their training stations or a local Transportation and Warehousing Company. Based on their findings have the students develop a report evaluating the policies and procedures and have them make suggestions as needed.

References

LAP 23-798

Warehousing--A Guide For Both Users and Operators
Chapter 14

Warehousing
Assignment 20

Aim for a Job in the Trucking Industry
Chapter 6

Transportation for Marketing and Business Students
Chapter 8

Cluster Instructional Objective: ABILITY TO UNDERSTAND PROCEDURES FOR TRANSPORTING GOODS

TW-16

What Does the Competent Marketing Employee Do?

705-Skill

In determining routing and quantities for transportation of goods to keep transportation costs at a minimum.

Suggested Learning Activities

In small groups have the students determine how suitable the various shipping methods are. Give each group different carriers and have the group determine; cost, suitability, will the carrier pick-up and deliver and any other information that will be helpful. Then as a class put the list together having each student make-up notes. Bring into class the following books: Billinger's Postal & Shipping Guide, Leonard's Guide For Parcel Post, Express, Freight Rates, and Routing.

Have the students determine the best way to ship the following goods at the least expense:

	FROM	TO
1. 3 lb. box-radio parts	Chicago	New York
2. Small 1 lb. box of expensive jewelry	Chicago	Los Angeles
3. 100 motors 1 hp. 2800 lbs.	Chicago	Detroit
4. 10 boxes dominos 200 lbs.	Chicago	Milwaukee
5. 6 boxes of games 200 lbs.	Chicago	Milwaukee

References

LAP 29-705

Materials Handling
Traffic and Transportation
Part 10

Warehousing--A Guide For Both Users and Operators
Chapter 7
Pages 26-27

Transportation
Chapters 10, 12

Traffic World's Questions and Answers
229-241

Cluster Instructional Objective: COMPREHEND THE IMPORTANCE OF KNOWING SERVICES AVAILABLE FROM CARRIERS TV-17

What Does the Competent Marketing Employee Do?

1106-Knowledge of/or Understanding that

Advantages and disadvantages of types of carrier services (motor, rail, air, U.P.S., etc.).

Suggested Learning Activities

Assign students or teams to present a list of service advantages and disadvantages of one of the following:

1. Motor truck
2. Rail
3. Air freight
4. United Parcel Service
5. Freight forwarders

NOTE: When setting-up student teams or buzz groups, instructor should spread students with above average knowledge and experience over all of the groups. (Avoid "loaded" groups)

References

1106

Transportation for Marketing and Business Students
Chapter 5

Domestic Transportation
Chapters 4, 5

Contemporary Physical Distribution
Chapter 4

Wholesaling and Physical Distribution
Chapter 6

Physical Distribution
Chapters 5, 6, 7

Your Job in Distribution
Parts 33, 34

Cluster Instructional Objective: KNOW AND BE ABLE TO USE ELEMENTS IN RATE STRUCTURES TO NEGOTIATE RATE CHANGES AND CONTRACTS

TW-18

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1107-Knowledge of/or Understanding that Negotiations and completion of carrier contracts (including freight rate levels.)	Contact a nearby industry traffic department and invite a traffic person specialized in negotiation of rates and carrier contracts to speak to students on elements of cost and procedures. (Encourage charts and graphs to be used.) Assign one group to develop a list of kinds of rates and define them, and another group to compile a list of costs and other factors involved in rate levels.	1107 Management of Physical Distribution and Transportation Chapter 15 Contemporary Physical Distribution Chapters 5, 6 Physical Distribution Chapter 3 Wholesaling and Physical Distribution Chapter 3 Materials Handling--Traffic and Transportation Part 15, Page 30 Industrial Traffic Management Chapter 5 Transportation for Marketing and Business Students Chapter 10

Cluster Instructional Objective: KNOW PROVISIONS OF UNION CONTRACTS REGARDING FREIGHT HANDLING

TW-19

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1109-Knowledge of/or Understanding that Carrier and union regulations when loading freight.	Obtain copies of master and local teamster's union contracts. Students can search contracts for provisions specifically directed at divisions of work among various job categories. A class session should be held to arrive at a concensus of all rules applicable to drivers, warehouseman, etc. Invite a labor relations person from a carrier to discuss and evaluate student findings, and illustrate with case studies.	1109 International Brotherhood of Teamsters Master and Local Union Contracts Industrial Traffic Management Chapter 7 Transportation for Marketing and Business Students Chapter 10

Cluster Instructional Objective: ABILITY TO USE SOUND VEHICLE LOADING PRACTICES

TW-20

9

Operations

What Does the Competent Marketing Employee Do?

1110-Knowledge of/or Understanding that

Sound loading techniques based on nature of goods, packaging, mode of transportation, balancing and bracing, load limits, etc.

Suggested Learning Activities

Brainstorming session. Students develop their ideas on loading and stacking of various kinds of commodities in small lots in the same car or trailer.

Visit a general commodity carrier or freight forwarder and observe loading practices, then revise the original list of ideas based on the observation of experienced freight handlers.

Borrow training and damage prevention films from a carrier, or a carrier training and procedure manual.

References

1110

Films and Observation
Refer to Audio-visual Department Film Directory

Contemporary Physical Distribution
Chapter 10

Wholesaling and Physical Distribution
Pages 62-68

Physical Distribution
Chapter 8
Page 107

Introduction to Wholesale Distribution
Pages 113-114

Industrial Traffic Management
Chapter 7

Warehousing
Assignments 3, 4, 6

Cluster Instructional Objective: COMPREHEND THE KINDS OF SUPPORTIVE DEVICES IN LOADING FREIGHT VEHICLES TW-21

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1111-Knowledge of/or Understanding that The uses of pallets, skids, ramps, and other supportive equipment in the loading process.	Field trip to a warehouse or carrier freight dock. Feedback from students on equipment observed being used to facilitate handling and loading. (As distinguished from material handling equipment such as fork trucks, conveyors, etc.) Students may leaf through issues of Material Handling Engineering, Handling and Shipping, Modern Materials Handling, and identify supportive equipment for loading operations.	1111 Warehousing Assignments 3, 4, 6, 16 Lesson Guide Outline in Material Handling Education Unit 4, 13 Physical Distribution Chapter 10 Wholesaling and Physical Distribution Chapter 9 (Old Issues of Magazines are often available from Traffic Departments and Warehouse Managers) Warehousing--A Guide For Both Users and Operators Pages 58-60 Materials Handling Traffic and Transportation Unit 9, Part 35

Cluster Instructional Objective: KNOW COMPLETE PROCEDURES FOR RECEIVING OPERATIONS

TW-22

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1112-Knowledge of/or Understanding that Checking procedures when receiving shipments -- actual count, spot check, quality control, etc.	Visit a warehouse and observe receiving operations assignment, quality control checks, inventory entry, and document handling. In class, develop a procedures manual that could be used for training a new employee. Borrow or obtain a training manual from a warehouse manager and study the step-by-step procedures used in receiving goods.	1112 Contemporary Physical Distribution Chapter 9 Materials Handling Chapter 7 Wholesaling and Physical Distribution Chapter 8 Physical Distribution Chapter 4 Warehousing--A Guide For Both Users and Operators Chapter 5 Introduction to Wholesale Distribution Chapter 3 Warehousing Assignment 7

Cluster Instructional Objective: KNOW THE PRINCIPLES AND TECHNIQUES OF MAINTAINING GOOD CUSTOMER RELATIONS

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1114-Knowledge of/or Understanding that Maintaining public relations and goodwill of present clients through activities such as servicing accounts, communicating with clients, etc.	Students develop an outline of things that can be cone to maintain goodwill with clients based on reading assignments. Form groups of four or five students. Assign each group a product or product line. Groups then decide which of the outlined techniques can be used in maintaining client goodwill with their particular product. Then have groups report findings to the class for peer group critique.	1114 Principles of Salesmanship Chapter 12 Fundamentals of Selling Chapter 4, 5 Retail Selling Chapter 30 2nd Edition Retailing Principles and Practices Units 9, 20 7th Edition, 1981 Wholesaling and Physical Distribution Chapter 3 Human Relations in Marketing Arizona Curriculum Guide Human Relations Section

Cluster Instructional Objective: ABILITY TO UNDERSTAND PROBLEMS IN RECEIVING SHIPMENTS OF MERCHANDISE

TW-24

What Does the Competent Marketing Employee Do?

1115-Knowledge of/or Understanding that

Procedures and time limits for filing claims of damage or overcharge.

Common to
Food Marketing

1134-Knowledge of/or Understanding that

The procedures for filing claims for merchandise damages, shortages and overcharges on carriers or manufacturers.

Suggested Learning Activities

Have students interview a person in charge of receiving at their training station. The students should specifically find out how to file damage and loss claims. They should also find out if there are different types of claims that can be made against a carrier and if so, find out the procedures for the different types.

References

1115

Physical Distribution
Chapter 4

Retail Selling
Chapter 33
2nd Edition

Retailing Principles and Practices
Part 18
7th Edition, 1981

Miller's Law of Freight Loss and Damage Claims
Chapter 7

Materials Handling
Traffic and Transportation
Parts 28, 29

Warehousing
Assignment 7

Cluster Instructional Objective: KNOW HOW TO TRACE A SHIPMENT IN TRANSIT

TW-25

What Does the Competent Marketing Employee Do?

1117-Knowledge of/or Understanding that

Procedures in tracing shipments with various carriers.

Suggested Learning Activities

Some students may be assigned to call several carrier's customer service desks to learn the tracing procedure, then report to the class.

Guest speakers or panel of customer service managers from rail, motor carrier, and air freight report on tracing procedures at their respective firms, and provide samples of forms used.

(Note: One visit from customer service people can cover many of the competencies: Tracing, expediting, loss and damage claims, billing errors, adjustments, etc.)

References

1117

Domestic Transportation
Chapter 17

Industrial Traffic Management
Chapter 12

Materials Handling--
Traffic and Transportation
Pages 210, 211

Physical Distribution
Page 51

Wholesaling and Physical Distribution
Pages 62, 63

Cluster Instructional Objective: IDENTIFY AND KNOW THE USE OF VARIOUS KINDS OF MATERIAL HANDLING EQUIPMENT

TW-26

9

Operations

What Does the Competent Marketing Employee Do?

1120-Knowledge of/or Understanding that

Demonstrate knowledge of various types of material handling equipment (fork trucks, pallet loaders, etc.) and supportive materials, (pallets, shelving, etc.).

Suggested Learning Activities

Video tape "On the Move: An Introduction to Material Handling."

Source: The Material Handling Institute, Inc.
1326 Freeport Road
Pittsburgh, PA 15238
28 Min. 3/4" Videocassette
$50.00 to Educational Institutions
Order on letterhead.

Have students leaf through trade publications and find pictures and diagrams of various types of equipment, then describe possible uses.

Field trip to a distribution warehouse to observe a variety of equipment in use.

View films from Equipment Manufacturers.
InterLake Steel
Jervis B. Webb
Material Handling Institute

References

1120

Lesson Guide Outline on Material Handling Education
Units 7-13

Magazines:
(Old issues often available from warehouses and hardware distributors)
"Modern Material Handling"
"Handling and Shipping"
"Material Handling Engineering"

Wholesaling and Physical Distribution
Chapter 9

Physical Distribution
Chapter 10

Warehousing
Assignments 3, 4, 6

Materials Handling
Part 35

9 Operations

Cluster Instructional Objective: KNOW THE FUNCTIONS OF VARIOUS AGENCIES OF THE U.S. D.O.T.

TW-27

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1121-Knowledge of/or Understanding that Functions of the U.S. Department of Transportation.	Reproduce diagrams in reference on the chalkboard as the functions and responsibilities of each agency or administration is discussed. Ask students to bring up problems or incidents that occur in transportation and decide which agency would handle it. Examples: Economic problems of a rail carrier would be handled by the Federal Railroad Administration; Airline Accidents would be handled by the N.T.S.B. (National Transportation Safety Board.)	1121 Domestic Transportation Chapters 23, 24 Management of Physical Distribution and Transportation Chapter 20

Cluster Instructional Objective: KNOW THE FUNCTIONS OF THE INTERSTATE COMMERCE COMMISSION (AS OPPOSED TO THOSE OF THE U.S. DEPARTMENT OF TRANSPORTATION)

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1122-Knowledge of/or Understanding that Of the functions of the Interstate Commerce Commission.	Emphasize the economic regulation exercised by the I.C.C. over surface carriers by listing areas or activities controlled by the commission, such as: mergers, rates, and fares. Political implications may be discussed by students as to why the I.C.C. reports to Congress rather than being part of the Department of Transportation which reports to the President. Students can discuss the economic implications if surface carriers were deregulated, that is freed from I.C.C. controls.	1122 Domestic Transportation Chapters 23, 24 Management of Physical Distribution and Transportation Chapter 20 Physical Distribution Page 60 Materials Handling Traffic and Transportation Part 13 Warehousing--A Guide For Both Users and Operators Pages 68, 119-120 Transportation for Marketing and Business Students Pages 57-62 134-137 170-171

Cluster Instructional Objective: UNDERSTAND THE IMPORTANCE OF INSTANT NOTICE OF SUPERVISOR WHEN INSUFFICIENT MATERIALS ARE NOT ON HAND

TW-29

9

Operations

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1125-Knowledge of/or Understanding that Demonstrate understanding of when to notify supervisor when there is insufficient materials to fill order or requisition. Common to Wholesaling, Food Marketing	Have students fill in information on a stock card with entries showing "stock in" and "stock out" and "on hand." Then write up an order or requisition in amounts that would cause the problem of insufficient stock to surface.	1125 Materials Handling Traffic and Transportation, Part 32 Contemporary Physical Distribution, Chapter 7 Warehouse Management, Assingment 15 Wholesaling and Physical Distribution, Pages 51-57 Warehousing--A Guide For Both Users and Operators, Pages 45-51 Retailing Principles and Practices, Parts 19, 20, 33, 7th Edition, 1981

Cluster Instructional Objective: KNOW PROCEDURES FOR CONTACTING CUSTOMERS ON DISCREPANCIES ON ORDERS

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1126-Knowledge of/or Understanding that Demonstrate understanding of when to contact customer if order or requisition is unclear, incomplete, or there are significant price changes.	Have students develop a procedure for customer notification when discrepancies turn up on customer's order: 1. Who notifies 2. What discrepancies require notice 3. How to record customer instructions	1126 Warehouse Management Assignment 15 Physical Distribution Pages 17-19 Wholesaling and Physical Distribution Pages 53-57

Cluster Instructional Objective: KNOW BASICS AND SOURCES OF INFORMATION ON CARRIER SIZE, WEIGHT, MARKING AND PACKAGING REQUIREMENTS

TW-31

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1127-Knowledge of/or Understanding that Of carrier regulations on size, weight, marking and packaging of shipments.	Study of regulations and carrier tariffs to grasp fundamentals. Have students follow a theoretical shipment from order picking to the point the carrier accepts shipment, to include: 1. Selection of carton or container 2. Interior packing 3. Taping or strapping 4. Markings and carton (for delivery and identification purposes) 5. Check of dimensions (for U.P.S. or U.S.P.S. shipments) Ideally students would spend several weeks training with a skilled shipping or rate clerk to learn the basics. Representatives of carton and container manufacturers could be invited to make a presentation explaining their methods of complying with container and package regulations. Also contact U.S. D.O.T. for special regulations on commodities classified as hazardous materials.	1127 Uniform Straight Bill of Lading Contract Terms and Conditions Reverse side of Number One Copy Materials Handling Unit 3 Part 30 Industrial Traffic Management Chapter 7 Contemporary Physical Distribution Chapter 10 Wholesaling and Physical Distribution Pages 58-59, 109-110 Physical Distribution Pages 33-40, 49-50

Cluster Instructional Objective: KNOW PACKAGING REQUIREMENTS ON EXPORT SHIPMENTS

TW-32

9

Operations

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1129-Knowledge of/or Understanding that Of special packaging requirements for export shipping.	Students can have field trips to the shipping area of an exporter to see major differences in packaging and marking of shipments moving in overseas water or air transport.	1129 Materials Handling Part 26 Industrial Traffic Management Chapter 17, page 550 Chapter 18 Appendix 2 Transportation for Marketing and Business Students Pages 195-196

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF ACCIDENT PREVENTION

TW-33

9

What Does the Competent Marketing Employee Do?

1133-Knowledge of/or Understanding that

How to avoid accidents by following predetermined traffic patterns around a warehouse.

Suggested Learning Activities

Students should contact the nearest state or Federal O.S.H.A. office for information on warehouse safety.

Guest speakers on safety in warehouses might include:

1. O.S.H.A. office
2. Insurance agent or underwriter
3. Warehouse managers or foremen

References

1133

Materials Handling
Parts 35, 36

Lesson Guide Outline on Materials Handling Education
Unit 26

Contemporary Physical Distribution
Chapter 9, Page 307

Warehouse Management
Assignment 20

Warehousing--A Guide For Both Users and Operators
Pages 153-156

Operations

Cluster Instructional Objective:

KNOW THE FUNDAMENTALS OF FREIGHT TRANSPORTATION REGULATIONS INCLUDING HANDLING OF HAZARDOUS MATERIALS

9

Operations

What Does the Competent Marketing Employee Do?

1135-Knowledge of/or Understanding that

Various laws dealing with freight transportation including shipment of hazardous materials.

Suggested Learning Activities

After study, students should be quizzed orally on regulatory institutions and their area control:

F.A.A. - Air Safety and Traffic Control
I.C.C. - Surface Carriers-Economic Regulation etc.

Students should develop an outline on the chalkboard of various areas of common carrier regulation:

Rates - just and reasonable
Mergers
Operating Authority etc.

Contact a regional office of the Department of Transportation (D.O.T.) to obtain a lecturer on hazardous materials handling and shipping; or have students write for an informational packet on hazardous materials:

U.S. Department of Transportation
Office of Hazardous Materials Operations
Washington, D.C. 20590

References

1135

Domestic Transportation
Part 6

Contemporary Physical Distribution
Chapter 5

Industrial Traffic Management
Chapter 18

The Interstate Commerce Act

Regulation of Transportation

Code of Federal Regulations, Title 49 - Transportation (Hazardous Materials)

Cluster Instructional Objective: KNOW SOURCES OF INFORMATION NEEDED FOR AND USES OF BASIC SHIPPING DOCUMENTS

TW-35

9

Operations

What Does the Competent Marketing Employee Do?

1136-Knowledge of/or Understanding that

Understand the Bills of Lading (air bill).

1137-Skill

Ability to prepare and distribute copies of the Bill of Lading.

Suggested Learning Activities

Students develop a list of all elements of information needed to complete a bill of lading. A transparency of a blank B/L can be placed on the screen and items filled in as students develop them (date, consignor, consignee, price, weight, etc.).

Selected students may contact a rail or motor carrier office and obtain information on what additional information appears on a F/B or W/B, how many copies are made and how they are used by the carrier.

Instructor can contact industrial traffic departments and/or carriers to obtain blank forms of documents that can be duplicated and handed out to students to fill in.

References

1136 - 1137

Management of Physical Distribution and Transportation
Chapter 19

Industrial Traffic Management
Chapter 4
Appendix 1

Contemporary Physical Distribution
Pages 184-187

Transportation for Marketing and Business Students
Chapter 9

Physical Distribution
Chapter 3

Cluster Instructional Objective: DEMONSTRATE USE OF VARIOUS ROUTE GUIDES IN ROUTING SEVERAL REAL OR THEORETICAL SHIPMENTS

TW-36

9

Operations

What Does the Competent Marketing Employee Do?

1138-Skill

Ability to route shipments by appropriate carrier and route.

Suggested Learning Activities

Students are given various kinds or types of "shipment" that must be routed. They will choose the appropriate guide and select a route that will apply. Since the number of tariffs and guides will probably be limited, this will probably be one student, in turn, demonstrating to the class.

A traffic manager or rate clerk can be invited to class to demonstrate the use of guides, then have students run through the exercise under his guidance.

References

1138

Industrial Traffic Management
Chapter 6

Tariff Practice Book
Routing Guide
Exercise 26J

Leonard's Guide - Motor Carriers

Materials Handling
Pages 72-75

Transportation for Marketing and Business Students
Page 195

Cluster Instructional Objective: ABILITY TO SCHEDULE EQUIPMENT PICKUPS AND DELIVERIES

TW-37

9

Operations

What Does the Competent Marketing Employee Do?

1139-Skill

Ability to set up carrier pickup and delivery sites.

Suggested Learning Activities

Provide a series of pickups, deliveries and a fleet of equipment for a mock demonstration by students. Student should organize pickups and deliveries in zones or patterns, then assign equipment to perform the work.

It is helpful to use a city or metropolitan map zoned to include commercial and industrial areas where major delivery and pickups will occur. An important objective of this exercise is route deliveries in such a manner that when deliveries are finished, equipment will end up in or near important pickup areas.

References

1139

Introduction to Wholesale Distribution
Chapter 7

Materials Handling
Unit 6

Warehousing--A Guide For Both Users and Operators
Chapter 8

Wholesaling and Physical Distribution
Chapter 7

Materials Handling
Pages 72-75

Physical Distribution
Chapter 3

Cluster Instructional Objective: ABILITY TO PREPARE DOCUMENTS INVOLVED IN SHIPPING GOODS

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1140-Skill Ability to prepare shipping records as they relate to billing, inventory control, and other related functions.	Have students do a mock demonstration showing their ability to fill out billing, manifesting, and other forms related to shipping. Provide student with blank forms, or use transparencies with forms imprinted thereon so student can fill them out with grease pencil. Distribution of copies should be indicated as some firms will use copies of shipping documents to notify order department, inventory control, collections department, etc.	1140 - 1141 Warehousing--A Guide For Both Users and Operators Chapter 5 Introduction to Wholesale Distribution Chapter 3 Materials Handling Unit 2 Warehousing Assignment 8 Physical Distribution Chapter 3 Wholesaling and Physical Distribution Chapter 5
1141-Skill Ability to prepare various documents such as bills of lading, freight bills, load manifests, delivery receipts, etc.		

Cluster Instructional Objective: ABILITY TO CLASSIFY A VARIETY OF COMMODITIES

TW-39

9

What Does the Competent Marketing Employee Do?

1142-Skill

Ability to classify freight in order to determine rates.

Suggested Learning Activities

Student is given several "shipments" and a copy of a classification tariff. He must then locate the correct class number for each shipment.

Shipments might be:

6 ctns.	(400 lbs.)	dress shoes
4 bdls.	(2800 lbs.)	steel bar stock
100 ctns.	(4000 lbs.)	toilet articles (etc.)

References

1142

Transportation
Chapter 10

Materials Handling
Unit 6

Warehousing--A Guide For Both Users and Operators
Chapter 7

Wholesaling and Physical Distribution
Chapters 5, 6

Physical Distribution
Chapters 5, 6, 7

Operations

Cluster Instructional Objective: ABILITY TO CALCULATE REVENUE SPLIT BETWEEN TWO CARRIERS

TW-40

9

Operations

What Does the Competent Marketing Employee Do?

1143-Skill

Ability to calculate freight charges on shipments moving over more than one carrier (interline).

Suggested Learning Activities

Student is given the revenue amount of a shipment moved via two carriers. For example:

Charge $23.50. Carrier "A" picked up the shipment in Kansas City and moved it to Cleveland, and turned the shipment over to Carrier "B" who delivered it at destination, Richmond, Virginia.

Using division tariff, student calculates how much of the revenue each carrier receives.

References

1143

Tariff Practice Book
(EC MCA or other
tariff bureau)
Section on division
factors

Motor Carriers Division Bureau or Baraneks Division Tariff

Cluster Instructional Objective:

ABILITY TO CALCULATE RATES AND
CHARGES ON A VARIETY OF SHIPMENTS

TW-41

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1144-Skill Ability to calculate rates on quantity and LTL shipments.	Student is supplied with bills of lading covering several shipments and with tariffs or a workbook. Student then must find the applicable rate and calculate charges for each. Shipments should include small shipments moving on class rates, volume shipments moving on both class and commodity rates, and some of the special charges, such as penalty for container violation, or detention charges.	1144 Tariff Practice Book (EC MCA) Regular Bureau Tariffs (If expired, tariffs available)

Cluster Instructional Objective: ABILITY TO ASSIST IN EQUIPMENT LOADING PROCEDURES

TW-42

9 Operations

What Does the Competent Marketing Employee Do?

1145-Skill

Ability to assist in loading procedures when required by a carrier.

Suggested Learning Activities

Use a diagram or schematic to represent a trailer or box car and deck of 3x5 cards, each representing a "shipment." Student then demonstrates the order of loading or stacking various kinds and sizes of shipments in order to utilize space and maintain proper weight distribution.

Examples of shipments:

2 bundles, 800 lbs. each
1 pallet 1000 lbs.
50 ctns. of canned goods 53 lbs. each
100 bags flour 100 lbs. each etc.

Student should also indicate kinds of material handling equipment he would use to assist in loading.

References

1145

Warehousing
Assignment 16

Wholesaling and Physical Distribution
Chapters 5, 6

Warehousing--A Guide For Both Users and Operators
Chapter 5

Introduction to Wholesale Distribution
Chapter 8

Materials Handling Traffic and Transportation
Unit 3

Cluster Instructional Objective: ABILITY TO CHECK QUANTITY AND CONDITION OF SHIPMENTS

TW-43

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1146-Skill Ability to accurately check quantity and condition of shipments.	Students should demonstrate ability to accurately check a shipment in from a carrier by reciting the step-by-step procedure they would use.	1146 - 1148 Materials Handling Traffic and Transportation Unit 7 Introduction to Wholesale Distribution Chapter 7 Warehousing--A Guide For Both Users and Operators Chapter 5 Physical Distribution Chapter 4 Wholesaling and Physical Distribution Chapter 8 Warehousing Assignment 7
1148-Skill Ability to approve carrier's receipts with any exceptions noted.		

Cluster Instructional Objective: ABILITY TO PREPARE AND USE RECEIVING DOCUMENTS AND RECORDS

TW-44

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
1147-Skill Ability to prepare receiving records and documents noting exceptions, such as damage, shortage, incorrect merchandise, etc.	Student is provided blank documents with which he demonstrates ability to fill them out properly. Instructor should introduce various exceptions to a routine procedure, such as: Wrong merchandise marked or damaged carton, one short on a ten lot, etc.	1147 Materials Handling Traffic and Transportation Unit 7 Introduction to Wholesale Distribution Chapter 7 Warehousing--A Guide For Both Users and Operators Chapter 5 Physical Distribution Chapter 4 Warehousing Assignment 7 Wholesaling and Physical Distribution Chapter 8

Cluster Instructional Objective: ABILITY TO FIX RESPONSIBILITY OR CAUSE OF DAMAGE

TW-45

What Does the Competent Marketing Employee Do?

1149-Skill

Ability to determine or pinpoint parties responsible for, or causes of, damage.

1150-Skill

Ability to contact seller or shipper about errors in or damage to shipments with various carriers.

Suggested Learning Activities

Instructor prepares several examples of damage to goods, and supplies circumstances surrounding discovery of the damage (including records). Student then demonstrates application of logic and analytical skill by making a determination of cause and/or where the damage occurred.

Examples:

1. Carton is intact but product damage is discovered when carton is opened--possible improper packing material, or possible rough handling if interior packing is sufficient.
2. Cartons in pallet load crushed. Possible mishandling by fork truck operator, or possible violation of container rules (check carton specifications against tariff rules and regulations).

References

1149 - 1150

Materials Handling
Traffic and Transportation
Unit 7

Introduction to Wholesale Distribution
Chapter 7

Warehousing--A Guide For Both Users and Operators
Chapters 5, 19

Physical Distribution
Chapter 4

Wholesaling and Physical Distribution
Chapter 8

Warehousing
Assignment 7

Cluster Instructional Objective: ABILITY TO TRACE SHIPMENTS

TW-46

What Does the Competent Marketing Employee Do?

1152-Skill

Trace lost or misplaced or stolen freight items.

Suggested Learning Activities

Bring in examples of "Tracer Requests." Make up copies for each student. Give the student sample problems, a bill of lading, the way bill and have them prepare the "tracer request."

Have a discussion on how to trace freight. Following the discussion have the student develop a procedures booklet for their training station to help assist them with tracing freight.

References

1152

Materials Handling
Traffic and Transportation
Part 29

Industrial Traffic Management
Chapter 12

Transportation
Pages 50, 51, 84, 85, 198, 199, 72

Warehousing--A Guide For Both Users and Operators
Chapter 5

Cluster Instructional Objective: ABILITY TO PROPERLY FILE PROPERLY AND RETRIVE INFORMATION

TW-47

Operations

9

What Does the Competent Marketing Employee Do?

1153-Skill

In filing and retriving filed information.

Suggested Learning Activities

In a brainstorming session have students develop a list of all possible forms and information that is used in transporting and receiving goods. Based on this list, have each student create a report on the procedures used to file this information. The students should be allowed time to research the information carefully either through books or field observations.

References

1153

Materials Handling
Traffic and Transportation
Unit 4

Warehousing
Assignment 17

Warehousing - A Guide For Both Users and Operators
Chapter 18

Retail Merchandising
Chapter 15

Cluster Instructional Objective: ABILITY TO UNDERSTAND DELIVERY INFORMATION

What Does the Competent Marketing Employee Do?

503-Knowledge of/or Understanding that

The delivery area served by the store, delivery schedules and delivery charges.

Common to
Food Marketing

OTHER CLUSTER COMPETENCIES

556-Skill

Suggested Learning Activities

From either selected readings or work experience, have students describe how a good delivery system should work and why it is necessary for employees to know what areas the store delivers to, the schedules, and the charges. Then you can have students explain "if it is necessary for a transportation and warehousing company to have delivery services and why or why not?"

Have students secure a map of the area served by either the high school or their training station. Then have the students be in charge of developing a delivery schedule for the school or training station. Policies for the delivery system such as charges, routes, number of deliveries, and cost should be developed. When finished, the students should discuss the findings with you. (It is best if the student can use their training station.)

References

LAP 25-503

Marketing and Distribution

Retail Merchandising
Chapter 5

Retailing Principles and Practices
Part 11

Transportation for Marketing and Business Students
Chapter 11

Industrial Traffic Management
Chapter 5

Materials Handling
Unit 7
Part 28

Cluster Instructional Objective: ABILITY TO UNDERSTAND DELIVERY INFORMATION

10
Product and/or Service Technology

What Does the Competent Marketing Employee Do?

556-Skill

In quoting to customers accurate delivery dates and charges.

OTHER CLUSTER COMPETENCIES

503-Knowledge of/or Understanding
that

Suggested Learning Activities

Discuss ramifications of not quoting delivery dates and charges accurately. (Both legal and economic.)

Given tickets/invoices geared to a particular industry, the student will interpret and orally give information concerning delivery and charges.

References

LAP 25-556

Retailing Principles and Practices
Part 69

Retailing Principles and Practices
Part 29
7th Edition, 1981

Fundamentals of Selling
Chapter 7, d
Pages 324-325

Physical Distribution
Chapter 9

Introduction to Wholesale Distribution
Chapter 7

Cluster Instructional Objective: COMPREHEND THE EFFECT OF HOW TO INCREASE SALES BY PRODUCT KNOWLEDGE

TW-3

What Does the Competent Marketing Employee Do?

554-Skill

In interpreting service guarantees and directions to customers.

Common to
General Retail Merchandising

OTHER CLUSTER COMPETENCIES

587-Knowledge of/or Understanding that

Suggested Learning Activities

Have the students bring in guarantees and role play situations having to explain the guarantees to a customer.

Have students observe transportation and warehousing clerks during a sales demonstration making notes of how information is given to the customer.

References

LAP 28-554

Retail Selling
Chapter 30

Retailing Principles and Practices
Part 42

Retailing Principles and Practices
Part 17
7th Edition, 1981

Materials Handling
Parts 15, 16

Warehousing: A Guide For Both Users and Operators
Pages 41-44

Transportation
Chapter 9

Cluster Instructional Objective: COMPREHEND THE EFFECT OF HOW TO INCREASE SALES WITH ADEQUATE SERVICE

Product and/or Service Technology 10

What Does the Competent Marketing Employee Do?

587-Attitude

A belief that adequate service will help increase sales and promote better customer relations.

OTHER CLUSTER COMPETENCIES

554-Skill

Suggested Learning Activities

Have students collect examples of product information and services found at specific transportation and warehousing firms. Then have the students present the different types in the form of a bulletin board or poster.

With permission from the owner or manager of a transportation and warehousing business, have students observe experienced clerks, as they present merchandise or services to customers. This observation may be watching the clerk handle a person by phone or in person. Then have the students take notes on how these people used product knowledge to close sales and promote better customer relations.

References

LAP 28-587

Fundamentals of Selling
Chapter 6

Retail Selling
Chapter 17

Retail Merchandising
Chapter 11

Basic Selling
Chapter 4
2nd Edition

Warehousing--A Guide for Both Users and Operators
Chapter 21

Your Job in Distribution
Pages 95-96

Cluster Instructional Objective: ABILITY TO RELATE THE VAULE OF INTERPRETIVE MERCHANDISE INFORMATION IN ORDER TO BUILD CUSTOMER SATISFACTION

TW-5

10

Product and/or Service Technology

What Does the Competent Marketing Employee Do?

588-Attitude

A belief that adequate service information will build customer confidence in the service as well as in the company.

Common to
    Finance and Credit
    General Retail Merchandising

Suggested Learning Activities

Have students interview, by phone and/or in person, a ticket or sales agent in the transportation or warehousing industry. Discuss, as a group, how particular information given by people in these occupations to their customers builds customer confidence in the services offered as well as in the company.

In two short role play situations, have the students demonstrate how adequate and inadequate service information may affect the customer's attitude.

References

LAP 39-588

Retail Selling
    Chapters 18, 30
    2nd Edition

Fundamentals of Selling
    Chapter 6

Retailing Principles and Practices
    Parts 22
    7th Edition, 1981

Merchandising in Action
    Chapters 1, 4

Warehousing--A Guide For Both Users and Operators
    Chapter 5

Wholesaling and Physical Distribution
    Chapter 3

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF CREDIT SALES

TW-1

11

What Does the Competent Marketing Employee Do?

824-Knowledge of/or Understanding that

The company's policies, terms and credit plans.

Common to
Finance and Credit

Suggested Learning Activities

Have students develop a credit policy, terms, and credit plans for a business. Have the students find out if the same type of policies would work for different types of businesses. Then discuss the findings and practicality of these policies with each student.

Have students give a brief report on the policies where they work. The students should be prepared to answer any questions that the class members might have.

Have students break into small groups. Each student should explain to their groups credit policies at their training station. One student from the group should act as a recorder to compile a master list of the various policies. Then the group should present their material to you or to the rest of the class.

References

LAP 15-824

Retail Selling
Chapter 30

Fundamentals of Selling
Chapter 7

Retailing Principles and Practices
Part 29

Transportation
Page 207

Traffic World's Questions and Answers
Pages 14-15

Materials Handling
Pages 34-35

Warehousing--A Guide For Both Users and Operators
Pages 72-75

Your Job in Distribution
Pages 211-212

Selling

Cluster Instructional Objective: COMPREHEND THE EFFECT OF PROVIDING INFORMATION TO GOOD SELLING TECHNIQUES TW-2

11

What Does the Competent Marketing Employee Do?

867-Skill

In showing a genuine interest in the customer's problem.

Common to
Food Marketing
General Retail Merchandising

OTHER CLUSTER COMPETENCIES

920-Attitude

Selling

Suggested Learning Activities

Role-play a situation where the salesperson does not pay attention to the needs of the customer. Have the students identify areas in which improvement is needed.

In small groups have the students discuss the following case problem:

Lola May is a DE student working at a local transportation and warehousing firm. When Joe Jones, a customer, entered the store, Lola received a telephone call from another customer. Lola excused herself and asked Joe to wait for a few minutes. She handled the telephone call and returned in less than five minutes to help Joe.

1. Would you handle this situation differently?
2. What are possible suggestions you would offer?

Break students into small groups. Have students brainstorm ways in which they could show an interest in customer's problems. A list could be developed by each group and compared at the end of the session.

References

LAP 39-867

Introduction to Wholesale Distribution
Chapter 18

Wholesale Management
Assignment 8

Wholesaling and Physical Distribution
Chapter 3

Basic Salesmanship
Chapter 5

Basic Selling
Chapter 5
2nd Edition

Retailing Principles and Practices
Parts 43, 44
7th Edition, 1981

Cluster Instructional Objective: COMPREHEND THE EFFECT OF PROVIDING INFORMATION TO GOOD SELLING TECHNIQUES

TW-3

What Does the Competent Marketing Employee Do?

920-Attitude

A feeling of sincere interest in customers and their problems.

Common to
- Food Marketing
- General Retail Merchandising
- Finance and Credit

OTHER CLUSTER COMPETENCIES

867-Skill

Suggested Learning Activities

Brainstorm a list of ways salespeople demonstrate their interest in customers.

Have students discuss how they would show interest in a customer for the following situation:

A new customer would like to have your company transport a large quantity of materials. The order is needed immediately. Your company is not able to take the load due to a breakdown in equipment. The customer doesn't know another resource for transporting the materials. How would you show interest in this customer?

References

LAP 39-920

Wholesale Management
  Assignment 8

Wholesaling and Physical Distribution
  Chapter 3

Introduction to Wholesale Distribution
  Chapter 18

Retail Selling
  Chapter 20

Retail Merchandising
  Chapter 11

Retailing Principles and Practices
  Unit 14
  7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF TREATING EACH CUSTOMER AS AN INDIVIDUAL

What Does the Competent Marketing Employee Do?

897-Skill

Ability to tactfully handle difficult customers.

Common to
  Food Marketing
  General Retail Merchandising
  Finance and Credit

OTHER CLUSTER COMPETENCIES

918-Attitude

Suggested Learning Activities

Prepare a sales demonstration that highlights the need to handle difficult customers. The coordinator can select three students and assign them to play the role of the following customers:

1. Silent
2. Undecided
3. Belligerant

Three other students can play the role of the salesperson. After the sales demonstration, discuss methods that were successful and possible means for improvement.

Let several students develop a bulletin board highlighting the types of difficult customers and suggestions for handling them.

References

LAP 43-897

Warehousing--A Guide For Both Users and Operators
  Page 53

Introduction to Wholesale Distribution
  Chapter 18

Retail Selling
  Chapter 20
  2nd Edition

Retail Merchandising
  Chapter 11

Retailing Principles and Practices
  Parts 14, 44
  7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF TREATING EACH CUSTOMER AS AN INDIVIDUAL

What Does the Competent Marketing Employee Do?

918-Attitude

A feeling that each customer is an "individual."

Common to
  Food Marketing
  Finance and Credit
  General Retail Merchandising

OTHER CLUSTER COMPETENCIES

897-Selling

Suggested Learning Activities

Break students into small groups to discuss:

1. Why customers are different.
2. The reasons customers should be handled differently.

The students should cite examples from their personal experience to back up their statement.

Review the following types of customers:

1. Impulsive
2. Deliberate
3. Undecided
4. Decided
5. Very talkative
6. Silent
7. Know-it-all

Let students give examples of these types of customers and methods they use to deal with them. In small groups, have students discuss the following case problem:

CASE PROBLEM:

A transportation and warehousing customer has returned a product that he/she feels is defective. The guarantee requires the customer to return the product to the manufacturer for repair. After a long discussion, a long line of customers has developed. What would you tell the customer?

References

LAP 43-918

Retail Merchandising
  Chapter 11

Retail Selling
  Chapter 21
  2nd Edition

Retailing Principles and Practices
  Part 44
  7th Edition, 1981

Introduction to Wholesale Distribution
  Chapter 18

Wholesale Management
  Assignment 6

Wholesaling and Physical Distribution
  Page 17

Cluster Instructional Objective: COMPREHEND THE IMPORTANCE OF BUILDING CUSTOMER LOYALTY

TW-6

11

What Does the Competent Marketing Employee Do?

828-Knowledge of/or Understanding that

Customer loyalty can be built with timely and friendly service.

Common to
Food Marketing
General Retail Merchandising

Suggested Learning Activities

Have students prepare a bulletin board on the importance of friendly service.

Invite a panel of business persons to discuss with the class why customer loyalty, timely merchandise, and friendly service are important to the successful operation of a business.

Have students interview five persons with whom they are acquainted to find out why these people shop at one particular company. Have students identify what the company's strongest and weakest qualities are.

Have students make a list of customer courtesies they like to see when they are shopping.

Have students make a list of companies in town that they go to because they know they will get friendly service.

References

LAP 47-828

Retail Merchandising
Chapter 5

Retail Selling
Chapter 30

Retailing Principles and Practices
Part 63
7th Edition, 1981

Warehousing--A Guide For Both Users and Operators
Chapter 4

Your Job in Distribution
Pages 264-265

Selling

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF PROPER TREATMENT OF CUSTOMERS

What Does the Competent Marketing Employee Do?

899-Skill

Ability to serve customers in the manner or style that management desires.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

OTHER CLUSTER COMPETENCIES

932-Attitude

Suggested Learning Activities

Break students into small groups to develop a list of 10 policies for serving customers in a transportation and warehousing firm. After the students complete the assignment, compare their results with actual policies from two or three companies. Discuss why certain policies that appear in the list generated by students do not (or do) appear in the others.

Review the importance of continuity in the treatment of customers. Cite examples where different treatment can lead to confusion or misunderstanding.

Have students visit three different transportation and warehousing firms. The students should note any differences in the treatment of customers in the stores and report the results to the class or the instructor.

References

LAP 48-899

Retail Selling
    Chapter 18
    2nd Edition

Introduction to Wholesale Distribution
    Chapter 18

Wholesale Management
    Assignment 6

Wholesaling and Physical Distribution
    Page 17

Retailing Principles and Practices
    Parts 14, 32
    7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF PROPER TREATMENT OF CUSTOMERS

TW-8

What Does the Competent Marketing Employee Do?

932-Attitude

That sufficient understanding of a firm's policies is necessary to truly represent the viewpoint of management to customers.

Common to
    Finance and Credit
    General Retail Merchandising

OTHER CLUSTER COMPETENCIES

899-Skill

Suggested Learning Activities

Have students obtain a copy of their company manual from their training station. The students should read the sections that deal with handling customers. Then students can write a short summary of the policies indicating how they as a clerk, would treat a customer in the store. If you want to expand this activity, you could have students identify corrections or additions that should be made to the manual. Or, this could be done as a separate exercise.

Have several students present a panel discussion on the importance of understanding a firm's policies in order to effectively serve customers.

References

LAP 48-932

Marketing in Action
    Chapter 11, d

Retailing Principles and Practices
    Parts 4 and 5

Retail Merchandising
    Chapter 5

Retailing Principles and Practices
    Parts 16, 32
    7th Edition, 1981

Aim for a Job in the Trucking Industry
    Chapter 8

Warehousing--A Guide For Both Users and Operators
    Chapters 13, 18

Cluster Instructional Objective: KNOWLEDGE OF HOW TO HANDLE MAIL AND TELEPHONE ORDERS

TW-9

What Does the Competent Marketing Employee Do?

835-Knowledge of/or Understanding that

How to handle mail or telephone orders for service.

Suggested Learning Activities

Using a teletrainer, provide students with a telephone order form. Have students give hypothetical orders and have students complete the forms.

In a group discussion, develop a list of positive and negative characteristics found in people who use the telephone. Discussion should focus on current practices at training stations or local transportation and warehousing firms.

Develop a set of mail orders. Present these to students who will then write up orders on forms provided by the instructor. Identify common mistakes made in preparing the orders and review ways to eliminate these mistakes.

References

LAP 21-835

Creative Selling
Page 68
2nd Edition

Retailing Principles and Practices
Part 45

Retail Selling
Chapter 27
2nd Edition

Fundamentals of Selling
Chapter 12
Part C

Introduction to Wholesale Distribution
Page 286

Your Job in Distribution
Part 19

Cluster Instructional Objective: COMPREHEND THE EFFECT OF SUGGESTING MERCHANDISE FROM PROMOTIONS

TW-10

What Does the Competent Marketing Employee Do?

826-Knowledge of/or Understanding that

Department and operation locations within the company.

Common to
Food Marketing
General Retail Merchandising

Suggested Learning Activities

From selected readings, have students read and then discuss why it is important to know where the merchandise is located within the company.

Have students of the same career interest break into small groups. The groups should discuss the methods their training stations use for determining department and merchandise locations. The groups should also discuss the best location for the check-out stand.

References

LAP 28-826

Basic Selling
Chapter 4
2nd Edition

Retailing Principles and Practices
Parts 14, 32

Basic Salesmanship
Chapter 4

Creative Selling
Chapter 3

Fundamentals of Selling
Chapters 3, 6

Retail Merchandising
Chapter 3, d

Warehousing
Assignment 9

Cluster Instructional Objective: ABILITY TO RELATE TO THE CUSTOMERS TW-11

What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
862-Skill In remembering customer's names when serving them. Common to Finance and Credit	Ask a guest speaker to address the class on memory training techniques. Ask for some exercises that can be used to increase and improve one's memory. Conduct a role-playing situation where certain students act as transportation and warehousing clerks and others as customers. Have the students find some key to remembering each customer's name.	LAP 32-862 Communications in Marketing Chapter 2 2nd Edition Warehousing--A Guide For Users and Operators Chapter 4 Aim for a Job in the Trucking Industry Chapter 8

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF PROVIDING PRODUCT INFORMATION

What Does the Competent Marketing Employee Do?

922-Attitude

A strong interest in the merchandise or service being sold.

Common to
    Food Marketing
    General Retail Merchandising
    Finance and Credit

OTHER CLUSTER COMPETENCIES

925-Attitude

Suggested Learning Activities

In a small group have students conduct a discussion on the importance of presenting information on a product or service enthusiastically. In their discussion encourage them to generate ideas on how to be enthusiastic when selling and talking about the product or service.

Have students interview a sales representative at a transportation and warehousing firm. They should report back on "Why it is important to have a strong interest in the service or product being sold."

References

LAP 35-922

Basic Salesmanship
    Chapter 5

Basic Selling
    Chapter 5
    2nd Edition

Introduction to Wholesale Distribution
    Chapter 18

Wholesale Mangement
    Assignments 6, 8

Wholesaling and Physical Distribution
    Chapter 3

Retailing Principles and Practices
    Parts 22, 40
    7th Edition, 1981

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF HANDLING CUSTOMER COMPLAINTS

TW-13

11

What Does the Competent Marketing Employee Do?

823-Knowledge of/or Understanding
that

The ways to handle customer complaints according to company policy.

Common to
General Retail Merchandising
Food Marketing
Finance and Credit

Suggested Learning Activities

Have two students perform a role-playing situation where one students acts as a transportation and warehousing clerk and the other student acts as a customer. The customer will enter the store and approach the clerk with a complaint about one of the company's pieces of merchandise or about one of the company's policies. The clerk must diplomatically handle the complaint so goodwill will be rebuilt between this customer and the company.

Have students find out the general policies for handling customer complaints at their training stations. Have students compare procedures used.

References

LAP 60-823

Relations in Business
Chapter 5

Customer Services
Chapter 5

Retailing Principles and Practices
Parts 30, 32
7th Edition, 1981

Warehousing--A Guide For Both Users and Operators
Chapter 5

Your Job in Distribution
Pages 97-98

Selling